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1989 MOTORCYCLE STATISTICAL ANNUAL

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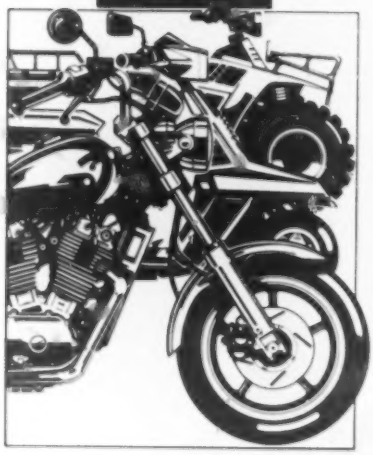

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The cooperation of the many contributors to this annual is gratefully acknowledged. The source note below each table credits the various government and private organizations which have provided information for the Statistical Annual.

Cover and section illustrations by Hector Cademartori.

Additional copies may be obtained from the MIC Executive or Government Relations office.

MOTORCYCLE INDUSTRY COUNCIL, INC.

Motorcycling continues to be a popular recreational activity and source of transportation. An estimated 30 million people operated a motorcycle, scooter, or ATV in the past year, which is comparable to participation in other recreational activities such as camping (44 million), golf (20 million), and hunting (21 million). Motorcycles, scooters, and ATVs are also used by industry and government agencies in such varied applications as agriculture, law enforcement and land resource management.

There are currently about 7.1 million motorcycles, scooters, and ATVs operating in the U.S. Motorcycles and scooters represent almost two thirds (65%) of the vehicle population while three and four-wheeled all-terrain vehicles (ATVs) make up the remaining one third (35%). The motorcycle industry generated about 7.1 billion dollars in consumer sales and services, state taxes, and licensing fees in 1988.

Approximately 710,000 motorcycles, scooters, and ATVs were sold new in 1988 at an estimated value of 2.3 billion dollars. Off-highway motorcycles and ATVs accounted for over half (53%) of total retail sales while on-highway motorcycles and scooters made up the remaining 47%. Six major distributors accounted for roughly 99% of the annual motorcycle, scooter, and ATV retail sales.

In 1988 the motorcycle industry supported over 11,000 retail outlets selling either new vehicles or specializing in motorcycle related services, parts, and accessories. These outlets employed over 53,000 people at an estimated annual payroll of $803 million. In the last several years many motorcycle retailers have expanded their business to include other products such as snowmobiles, personal watercraft, or other power products.

In 1987 the MIC launched a long term, public awareness campaign, "Discover Today's Motorcycling", to stimulate greater interest, involvement and understanding of motorcycling among the general public. The MIC also sponsors a public service program to encourage motorcycle rider responsibility in noise reduction and environmental protection.

The MIC actively works with state and Federal government agencies to encourage intelligent land planning and management. MIC endorses multiple use, which is equitable to all outdoorsmen, including those who ride the 4 million motorcycles and ATVs used for off-highway recreation. The MIC has joined the U.S. Forest Service in its "Tread Lightly" campaign, an environmental awareness program aimed toward motorized recreationists.

Motorcycles in the 1980's are cleaner in terms of air pollutants than motorcycles in the past. National exhaust emission controls for new motorcycles began in 1978. Although motorcycles contributed less than 1 percent of the total hydrocarbon emissions nationwide before controls, the motorcycle industry supported the adoption of uniform national standards to regulate exhaust emissions.

The motorcycle industry's continuing commitment to reduce sound levels in our environment has been demonstrated by the production of quiet motorcycles and aftermarket exhaust systems. Many new models are as quiet as new automobiles. With the support of the industry, the U.S. Environmental Protection Agency set uniform national noise standards for new motorcycles and mopeds produced after 1981. MIC actively assists noise enforcement authorities in cost-efficient programs for motorcycle noise control.

The information in this publication has been gathered to provide a comprehensive source of motorcycle statistics. We welcome your comments for future editions.

The Motorcycle Industry Council is a nonprofit, national trade association of over 80 members, representing manufacturers and distributors of motorcycles, all-terrain vehicles, scooters, parts and accessories and members of allied trades. While the MIC name was founded in 1969, the association has existed under other names since 1914. In addition to the Irvine, California office, the MIC maintains a Government Relations office in the Washington D.C. area.

The MIC provides assistance and information to our members, the motorcycle industry in general, government officials and the public. The staff takes positive action on legislative and public issues affecting the interests of our industry. Through membership dues, the MIC supports activities in Government and Public Relations, Statistics, Land Use, and Technical and Aftermarket programs.

Other publications and materials available through the MIC include:

- **Information Kit on Helmet Effectiveness, 1989**
- **Off-Highway Motorcycle and All-Terrain Vehicle Stationary Sound Test Manual, 1989**
- **Publications for Off-Highway Vehicle Land Management and Planning**
- **"Managing Off-Road Motorcycle Use in a Desert Environment," 35mm Slide Presentation**
- **"Managing Trailbike Recreation in a Forest Environment," 35mm Slide Presentation**
- **"Volunteer Trail Riders in the National Forests," Video Tape Presentation**
- **"Motorcycle Noise — Off-Highway Enforcement," 35mm Slide Presentation**
- **Federal Equipment Standards for Motorcycles Summary Booklet, 1989**
- **Federal Motor Vehicle Safety Standards for Motorcycles**
- **State On-Highway Motorcycle Equipment Requirements Chart**
- **State Off-Highway Motorcycle Requirements Chart**

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June 28, 1989

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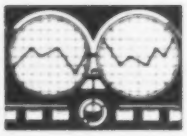
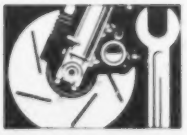
Contents



	Page
The Market Volume	5-18
U.S. Motorcycle Population by Model Type, Engine Displacement, Year	6
U.S. Motorcycle Population, Model Type by Engine Displacement	7
U.S. Motorcycle Population and Penetration by Region and State	8
Total Motorcycle Registrations by Year	9
Total Motorcycle Registrations by State	10
Economic Value of the Motorcycle Retail Marketplace by State	11
New Motorcycle Retail Sales by Model Type	12
U.S. Production, Import, Wholesale, New Registration Summary	13
U.S. Motorcycle Imports by Year, Country, Engine Displacement	14
New Motorcycle Wholesale Sales by Major Brands	15
New Motorcycle Registrations by State	16
New Motorcycle Registrations by Leading Brands	17
Motorcycle Scrappage and Operability Rate	18



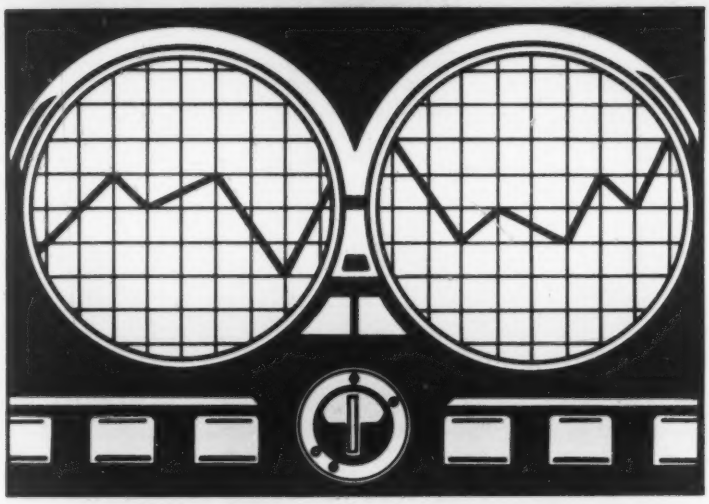
Manufacturers and Distributors	19-22
Profile of Major U.S. Motorcycle Manufacturers and Distributors	20
Other U.S. Motorcycle Manufacturers and Distributors	21-22

The Retail Marketplace	23-26
Motorcycle Retail Outlets, Employees, and Payroll	24
Motorcycle Outlet Retail Sales	25
Motorcycle Retail Outlet Profile	26

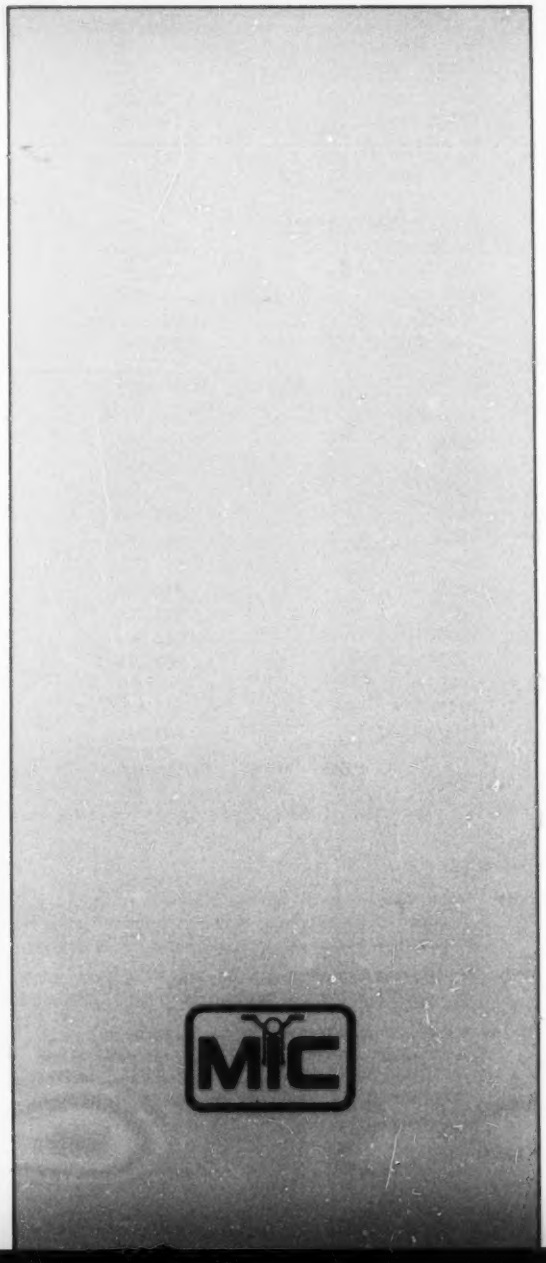
Motorcycle Usage	27-40
U.S. Motorcycle Usage On and Off-Highway by State	28
Public Land and Off-Highway Motorcycle Statistics by State	29
Miles Traveled, On and Off-Highway Mileage by Model Type	30
Miles Traveled by Model Type for On and Off-Highway	31
Average Annual Motorcycle Mileage	32
On-Highway Motorcycle Fuel Economy and Commuting	33
Motorcycle Rider Education Programs	34
State Motorcycle Rider Education Programs	35
State Motorcycle Operator Licensing Programs	36
State Motorcycle Operator Licensing Procedures	37
Motorcycle Accident Statistics by State	38
State Motorcycle Equipment Requirements	39
State Off-Highway Motorcycle Requirements	40

The Motorcycle Owner	41-43
Number of Owners, Sex, Marital Status, Age, Education	42
Owner Occupation, Income, Riding Experience, Motorcycle Ownership	43

Other National Motorcycle Organizations	44
Index	46



The Market Volume



U.S. MOTORCYCLE POPULATION BY MODEL TYPE, ENGINE DISPLACEMENT, AND YEAR

In 1988 there were an estimated 7.14 million motorcycles, scooters and all-terrain vehicles (ATVs) in use in the United States, compared to an estimated 7.57 million in 1987.

Of the total population in 1988, 47.4% were *on-highway* motorcycles and scooters, 44.7% were *off-highway* motorcycles and ATVs, and 7.9% were *dual purpose* motorcycles. The off-highway and ATV segment increased as a portion of the market in 1988 compared to 1987, while the on-highway and dual purpose segments decreased.

Of all motorcycles, scooters and ATVs in use, it is estimated that just over half (59%) have an engine displacement less than 350 cubic centimeters. About three fifths (62%) of the estimated population were purchased new during the last five years.

ESTIMATED U.S. MOTORCYCLE POPULATION MODEL TYPE, ENGINE DISPLACEMENT, AND YEAR

	1988		Revised 1987	
	Number of Motorcycles	% of Total	Number of Motorcycles	% of Total
Model Type*				
On-Highway	3,385,000	47.4%	3,640,000	48.1%
Off-Highway	3,190,000	44.7%	3,255,000	43.0%
Dual Purpose	560,000	7.9%	670,000	8.9%
	7,135,000	100.0%	7,565,000	100.0%
Engine Displacement				
Under 125 cc	1,438,900	20.1%	1,514,200	20.0%
125-349 cc	2,743,500	38.5%	2,838,800	37.5%
350-449 cc	468,000	6.6%	522,500	6.9%
450-749 cc	1,223,900	17.2%	1,318,600	17.4%
Over 749 cc	1,260,700	17.6%	1,370,900	18.2%
	7,135,000	100.0%	7,565,000	100.0%
Year Sold New				
1988	688,200	9.7%	—	—
1987	902,400	12.7%	944,100	12.5%
1986	939,700	13.2%	995,100	13.2%
1985	995,200	13.9%	1,093,600	14.5%
1984	915,600	12.8%	1,031,100	13.6%
1983	677,500	9.5%	781,400	10.3%
1982	445,700	6.2%	549,400	7.3%
1981	397,400	5.6%	502,000	6.6%
1980	280,300	3.9%	380,800	5.0%
1979	207,500	2.9%	280,800	3.7%
1978	128,300	1.8%	185,500	2.5%
1977	107,300	1.5%	158,000	2.1%
Prior to 1977	449,900	6.3%	663,200	8.7%
	7,135,000	100.0%	7,565,000	100.0%

NOTE: The 1984 - 1988 estimates are comparable only to the 1980 and revised 1979 estimates.

*** Model Type Definition:**

On-Highway: Motorcycles certified by the manufacturer as being in compliance with the Federal Motor Vehicle Safety Standards (FMVSS), and designed for use on public roads. *Includes scooters (510,000 in 1988 and 460,000 in 1987). Excludes mopeds and nopeds* (limited speed motor-driven cycles under 50 cc, without fully operative pedals).

Off-Highway: Motorcycles and all-terrain vehicles (ATVs) not certified by the manufacturer to be in compliance with FMVSS. *Includes three and four-wheeled ATVs (2,517,000 in 1988 and 2,500,000 in 1987).*

Dual Purpose: Motorcycles certified by the manufacturer as being in compliance with FMVSS, and designed with the capability for use on public roads, as well as off-highway recreational use.

Source: 1987 and 1988 Estimated Motorcycle Population, Motorcycle Industry Council, Inc., Irvine, CA.

U.S. MOTORCYCLE POPULATION, MODEL TYPE BY ENGINE DISPLACEMENT

On-highway motorcycles tend to have relatively large engines. In 1988, over two-thirds (69%) of the on-highway motorcycles in use had an engine displacement over 449 cc's.

The off-highway segment, including competition motorcycles and all-terrain vehicles (ATVs), is dominated by relatively small engines. In 1988 nearly all (91%) of the off-highway motorcycles and ATVs in use had an engine displacement less than 350 cc's.

Dual purpose motorcycles also tend to have relatively small engines. Eight in every ten (80%) of the dual purpose motorcycles in use in 1988 had an engine displacement less than 350 cc's.

ESTIMATED U.S. MOTORCYCLE POPULATION MODEL TYPE BY ENGINE DISPLACEMENT

	1988		Revised 1987	
	Number of Motorcycles	% of Total	Number of Motorcycles	% of Total
Model Type				
On-Highway	3,385,000	100.0%	3,640,000	100.0%
Under 125 cc	507,700	15.0%	465,400	12.8%
125-349 cc	331,400	9.8%	345,200	9.5%
350-449 cc	220,400	6.5%	301,100	8.3%
450-749 cc	1,064,800	31.5%	1,157,400	31.8%
Over 749 cc	1,260,700	37.2%	1,370,900	37.6%
Off-Highway	3,190,000	100.0%	3,255,000	100.0%
Under 125 cc	752,200	23.6%	832,800	25.6%
125-349 cc	2,144,600	67.2%	2,166,200	66.5%
350-449 cc	215,500	6.8%	179,500	5.5%
450-749 cc	77,700	2.4%	76,500	2.4%
Over 749 cc	0	0.0%	0	0.0%
Dual Purpose	560,000	100.0%	670,000	100.0%
Under 125 cc	179,000	32.0%	216,000	32.2%
125-349 cc	267,500	47.8%	327,400	48.9%
350-449 cc	32,100	5.7%	41,900	6.3%
450-749 cc	81,400	14.5%	84,700	12.6%
Over 749 cc	0	0.0%	0	0.0%

NOTE: The 1984 - 1988 estimates are comparable only to the 1980 and revised 1979 estimates.

On-highway includes scooters (510,000 in 1988 and 460,000 in 1987). Excludes mopeds and nopeds.
Off-highway includes three and four-wheeled all-terrain vehicles (2,517,000 in 1988 and 2,500,000 in 1987).
See page 6 for model type definitions.

Source: 1988 and 1987 Estimated Motorcycle Population, Motorcycle Industry Council, Inc., Irvine, CA.

U.S. MOTORCYCLE POPULATION AND PENETRATION BY REGION AND STATE

On a regional basis the greatest number of motorcycles, scooters and ATVs in use in 1988 were in the South and the Midwest. Although the West ranked third in motorcycle, scooter and ATV population, California was, by far, the nation's leading state, where one in every eight (12%) of the nation's motorcycles, scooters and ATVs were owned.

In 1988 there were an estimated 2.9 motorcycles, scooters and ATVs owned by every 100 persons living in the United States. Regionally, penetration was highest in the West where 3.4 vehicles were owned for every 100 residents, and lowest in the East where 2.2 vehicles were owned for every 100 residents.

Nearly one third (32%) of the nation's motorcycle, scooter and ATV population was owned in the five leading states; California, Texas, New York, Michigan, and Florida.

1988 ESTIMATED U.S. MOTORCYCLE POPULATION AND PENETRATION BY REGION

WEST
1,735,200 motorcycles, scooters & ATVs
3.4 vehicles per 100 persons
(Alaska and Hawaii included in West)

EAST
1,289,200 motorcycles, scooters & ATVs
2.2 vehicles per 100 persons

MIDWEST
1,859,300 motorcycles, scooters & ATVs
3.1 vehicles per 100 persons

SOUTH
2,251,300 motorcycles, scooters & ATVs
2.9 vehicles per 100 persons

1988 ESTIMATED U.S. MOTORCYCLE POPULATION AND PENETRATION BY STATE

State	Motorcycle Population	Motorcycle Population by Model Type: On-Hwy.	Off-Hwy.	Dual Purpose	Motorcycle Penetration Per 100 Population
Alabama	154,400	53,100	88,300	13,000	3.8
Alaska	38,100	5,700	29,100	3,300	7.3
Arizona	115,600	47,300	58,500	9,800	3.3
Arkansas	137,800	36,300	91,900	9,600	5.8
California	891,000	471,900	338,600	80,500	3.1
Colorado	101,300	47,000	40,600	13,700	3.1
Connecticut	77,400	47,300	25,700	4,400	2.4
Delaware	14,100	6,600	6,800	700	2.1
D.C.	1,800	1,800	0	0	0.3
Florida	295,000	160,700	108,900	25,400	2.4
Georgia	215,700	90,100	110,700	14,900	3.4
Hawaii	—	— Not Available —			
Idaho	59,200	15,900	31,200	12,100	5.9
Illinois	248,500	160,800	71,000	16,700	2.1
Indiana	192,200	109,500	72,200	10,500	3.5
Iowa	126,100	84,200	34,100	7,800	4.4
Kansas	73,600	40,100	26,800	6,700	2.9
Kentucky	95,100	35,700	52,600	6,800	2.6
Louisiana	140,200	43,900	88,400	7,900	3.2
Maine	56,500	26,900	26,100	3,500	4.7
Maryland	88,000	48,400	33,100	6,500	1.9
Mass.	120,100	72,000	42,900	5,200	2.0
Michigan	316,300	146,900	154,100	15,300	3.4
Minnesota	166,900	83,000	73,900	10,000	3.9
Mississippi	87,700	23,400	59,000	5,300	3.3
Missouri	145,800	51,500	86,000	8,300	2.8

State	Motorcycle Population	Motorcycle Population by Model Type: On-Hwy.	Off-Hwy.	Dual Purpose	Motorcycle Penetration Per 100 Population
Montana	41,400	11,000	22,500	7,900	5.1
Nebraska	57,100	24,000	27,700	5,400	3.6
Nevada	40,800	17,800	19,200	3,800	3.9
N.H.	59,300	31,700	24,800	2,800	5.5
New Jersey	134,000	70,600	55,000	8,400	1.7
New Mexico	51,000	21,700	22,000	7,300	3.4
New York	325,800	182,700	124,800	18,300	1.8
N.C.	166,100	61,600	94,000	10,500	2.6
N.D.	29,500	12,900	12,700	3,900	4.4
Ohio	289,900	156,800	119,700	13,400	2.7
Oklahoma	105,700	42,000	47,600	16,100	3.3
Oregon	118,100	45,600	60,900	11,600	4.3
Penn.	288,700	125,600	143,100	20,000	2.4
R.I.	23,100	16,900	5,000	1,200	2.3
S.C.	71,000	34,000	32,400	4,600	2.0
S.D.	30,300	14,100	12,800	3,400	4.2
Tennessee	171,400	56,800	100,500	14,100	3.5
Texas	466,300	235,500	191,900	38,900	2.8
Utah	92,400	25,400	51,700	15,300	5.5
Vermont	21,700	8,900	11,500	1,300	3.9
Virginia	144,900	69,200	63,700	12,000	2.4
Washington	161,200	76,200	66,900	18,100	3.5
W. Virginia	78,700	18,100	53,500	7,100	4.2
Wisconsin	183,100	109,100	61,300	12,700	3.8
Wyoming	25,100	6,800	14,300	4,000	5.2
U.S. Total	7,135,000	3,385,000	3,190,000	560,000	2.9

Note: Includes scooters and ATVs, and excludes mopeds and nopeds. See page 6 for model type definitions.
The 1984 - 1988 state estimates are comparable only to the 1980 and revised 1979 estimates.

Source: 1988 Estimated Motorcycle Population, Motorcycle Industry Council, Inc., Irvine, CA.
Estimates of the Resident Population of States, July 1, 1987 and 1988, U.S. Department of Commerce, Bureau of the Census.

TOTAL MOTORCYCLE REGISTRATIONS BY YEAR

Of the 7.1 million motorcycles, scooters, and ATVs in use in the United States, an estimated 4.4 million, or 62%, were registered for use on public roads in 1988. In order to be registered for use on public roads, motorcycles must be in compliance with the Federal Motor Vehicle Safety Standards and the state motorcycle equipment requirements. The equipment requirements for street registered motorcycles are summarized on page 39. A few states, however, include the titling of off-highway motorcycles and ATVs in their registration files.

The motorcycle industry experienced phenomenal growth during the 1960's and 1970's. Since 1960 motorcycle registrations increased almost tenfold while automobile registrations have only doubled.

U.S. TOTAL MOTORCYCLE REGISTRATIONS, 1945-1988

YEAR	TOTAL
1988	4,426,000
1985	5,216,000
1980	5,681,000
1975	4,964,000
1970	2,815,000
1965	1,382,000
1960	575,000
1955	450,000
1950	454,000
1945	198,000

Source: U.S. Department of Transportation, Federal Highway Administration for 1945-1975 motorcycle registrations. Motorcycle Safety Foundation, Irvine, California for 1980 and subsequent year motorcycle registrations.

TOTAL MOTORCYCLE REGISTRATIONS BY STATE

In 1988 motorcycle registrations accounted for 2.4% of all motor vehicles registered for use on public roads in the United States.

Regionally, the greatest portion of the nation's motorcycle registrations (32%) occurred in the Midwest. The West (28%) was second in motorcycle registrations, followed by the South (23%). The East (17%) reported the smallest portion of U.S. motorcycle registrations.

The five leading states, California, Ohio, Illinois, Texas and Florida, accounted for just over one third of the 4.4 million motorcycles registered in 1988.

U.S. TOTAL MOTORCYCLE REGISTRATIONS BY STATE, 1979-1988

State	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988
Alabama	74,426	73,978	75,220	70,960	71,333	71,502	66,176	62,562	56,752	52,715
Alaska	9,607	10,651*	8,888	10,897*	15,087	15,094	14,432	14,103	13,273	12,461
Arizona	76,637	81,846	86,216	84,776	76,716	84,093*	78,430	78,233	76,741	76,091
Arkansas	33,462	34,106	30,388	25,938	23,768	28,119	28,844	28,844	20,048	16,586
California	729,181	737,774	731,310	645,000	695,813	695,251	702,782	699,239	647,488	664,819
Colorado	117,593	115,500*	121,510*	119,079	120,000*	120,000*	110,562	107,660	107,000*	115,629
Connecticut	73,963	77,456	80,470	79,932	80,317	79,854	61,242	60,964	63,613	59,331
Delaware	11,508	8,261	8,238	8,216	8,538	8,573*	8,360	8,124	7,455	7,768
Dist. of Col	3,573	5,339	5,758	5,896	5,514*	5,599*	3,385	2,758	2,478	1,911
Florida	220,465	197,541	225,441	221,571	224,965	221,339	239,840	216,025*	234,498	203,913*
Georgia	105,058	118,453	112,517	110,795*	110,795*	114,234	89,556	84,543	79,887	75,341
Hawaii	6,635	9,696	10,700	11,317	8,563	10,199	10,607	11,055	12,065	11,544
Idaho	51,417	56,287	55,975	53,302	52,124	50,595	47,854	47,019	41,712	38,282
Illinois	281,406	289,436	305,727	285,188	295,655	309,807*	241,105	250,829	242,000*	243,789
Indiana	167,067	179,741	172,574	160,071	138,916	135,729	133,232	135,729	104,578	99,745
Iowa	204,133	219,221	233,172	234,985	238,687	183,687	180,277	172,444	163,521	145,967
Kansas	95,105	92,218	140,677	106,566	83,587	83,744	78,738	73,890	69,532	64,724
Kentucky	62,132	62,057*	65,000	60,958	58,357	50,355	38,799	38,497	35,435	32,054
Louisiana	76,393	75,000*	75,000*	109,312	92,740	104,000	113,667	89,700	93,352	68,080
Maine	42,947	38,133	39,857	38,872	38,872	40,361	37,950	37,246	37,676	35,876
Maryland	77,029	74,250	80,289	78,829	74,406	71,761	70,500	74,891	58,188	51,358
Massachusetts	100,506	98,935*	100,369	108,410*	93,405	103,000	94,999	85,000	66,366	59,000*
Michigan	251,290	254,129	243,858	230,794	219,929	200,609	203,226	185,993	161,626	150,000*
Minnesota	177,548	157,815	166,151	159,345	155,502	153,851	151,449	141,261	134,590	128,956
Mississippi	24,504	22,059	29,273	29,068	28,198	26,116	25,653*	28,198	18,551	18,411
Missouri	100,922	118,284	142,488	117,787	109,154	111,106	98,766	78,533	98,766*	81,123
Montana	61,000	35,100*	35,470	45,702	32,761*	37,371*	35,119*	27,493	25,503	24,294
Nebraska	54,967	52,149	50,371	47,887	47,172	46,532	42,548	33,077	31,770	29,088
Nevada	23,084	19,958	21,008	21,940	26,062	20,780	20,013	18,899	21,248	17,649
New Hampshire	32,883	44,815	43,462	49,196*	49,756*	35,543	36,421	36,007	29,463	30,410
New Jersey	102,318	102,425*	106,753*	114,112*	115,964*	115,303	95,500	116,502*	77,073	77,734
New Mexico	46,947	50,576	52,810	58,587	58,217	56,148	52,236	42,152	40,127	35,421
New York	179,042	208,727	160,619	157,792	163,740	174,911	216,688	214,893	207,524	201,265
North Carolina	103,751	114,615	110,156*	110,000	69,616	67,615	67,632	64,129	64,129	59,991
North Dakota	28,165	29,613	31,115	31,312	32,134	31,480	30,596	28,118	32,152	23,978
Ohio	267,100	285,600*	185,678*	277,143	290,799	280,297	277,487	304,128	258,243	243,885
Oklahoma	124,925	125,380	129,704	137,369*	127,800	105,963	104,457	68,093	67,802	64,056
Oregon	81,267	90,301	92,316	90,261	89,956	78,166	89,886	87,105	83,281	71,538
Pennsylvania	217,757	269,565	190,480*	227,752	208,925	207,170	201,069	190,345	183,130	174,790
Rhode Island	23,428	22,442*	23,789*	22,895	27,853	27,907	27,454	27,155	29,354	32,626
South Carolina	37,450	38,875	42,257	35,028	36,130	37,119	37,119	36,074	34,220*	33,426
South Dakota	31,178	35,045	38,265	38,418	39,255	38,956	37,905	36,036	33,800	31,421
Tennessee	85,251	84,121	83,179	83,269	79,821	100,879	85,985*	114,071*	82,728	114,071*
Texas	291,510	310,000*	300,330	312,924*	334,681	306,578	277,551	248,715	225,997	206,497
Utah	61,844	63,153	66,653*	66,934*	64,758	67,603*	71,923*	53,000	45,435	28,900
Vermont	20,826	23,293	29,449*	21,812	21,347	25,724*	23,415	23,048	21,854	17,438
Virginia	79,492	80,518	87,951	80,515	79,039	81,825	83,920	79,037	72,183	66,327
Washington	131,341	135,899	139,931	131,667	127,950	136,679*	125,224	122,751	124,215	112,228
West Virginia	37,605	39,518	37,680	37,680	31,789	33,432	32,270	31,992	27,067	26,511
Wisconsin	185,206	191,725	190,961	188,863	185,685	190,612	188,331	186,020	167,792	167,055
Wyoming	19,606	19,900*	20,763*	21,937	22,401	22,282	16,760	21,500	21,428	20,050
TOTAL	5,502,450	5,681,479	5,618,336	5,578,859	5,484,552	5,405,453	5,215,941	5,023,780	4,654,709	4,426,123

Note: See footnote on page 38 for types of vehicles included in 1988 state total motorcycle registrations. *Estimated

Source: U.S. Department of Transportation, Federal Highway Administration for total registrations prior to 1980.
Motorcycle Safety Foundation, Irvine, California for 1980 and subsequent years.

ECONOMIC VALUE OF THE MOTORCYCLE RETAIL MARKETPLACE BY STATE

In 1988 the motorcycle industry generated an estimated $7.14 billion in consumer sales and services and state taxes and licensing, of which $2.29 billion, or 32.1%, is attributed to retail sales of new motorcycles, scooters, and ATVs.

In addition to this $7.14 billion generated by the retail marketplace, major contributions to the economic value of the industry in personnel salaries, product advertising, corporate and personal income taxes, etc., are made by the manufacturers and distributors of new motorcycles, scooters and ATVs, parts and accessories, and the trades allied to the industry.

1988 ESTIMATED ANNUAL ECONOMIC VALUE OF THE MOTORCYCLE RETAIL MARKETPLACE BY STATE

State	1988 Estimated Annual* Economic Value of the Retail Marketplace	1988 Estimated Retail Sales of New Motorcycles	
	$000's	Units	$000's
Alabama	$ 122,390	15,110	$ 39,160
Alaska	61,120	4,670	15,220
Arizona	111,160	9,100	34,790
Arkansas	157,920	18,550	53,690
California	898,880	89,530	294,830
Colorado	109,080	8,980	34,140
Connecticut	91,120	7,570	28,520
Delaware	22,550	2,000	6,630
Dist. of Col.	2,110	100	620
Florida	256,730	29,140	87,030
Georgia	210,650	29,340	71,410
Hawaii	Not Avail.	Not Avail.	Not Avail.
Idaho	71,530	5,960	17,810
Illinois	252,400	23,310	85,560
Indiana	174,250	19,720	59,070
Iowa	112,720	10,680	36,070
Kansas	69,640	4,870	17,340
Kentucky	88,270	10,880	27,630
Louisiana	101,160	10,800	31,660
Maine	74,140	4,880	18,460
Maryland	115,090	10,930	36,830
Massachusetts	157,480	13,810	53,540
Michigan	319,920	34,810	104,290
Minnesota	189,710	18,070	64,310
Mississippi	80,060	9,060	25,060
Missouri	137,470	13,070	43,990
Montana	$ 45,950	4,350	$ 13,510
Nebraska	48,130	3,760	14,150
Nevada	47,720	5,010	14,030
New Hampshire	92,690	5,950	23,080
New Jersey	163,050	15,690	55,270
New Mexico	61,040	4,670	15,200
New York	332,700	31,020	108,460
North Carolina	180,680	19,360	61,250
North Dakota	21,530	1,650	6,330
Ohio	265,040	23,550	89,850
Oklahoma	82,530	6,630	20,550
Oregon	108,630	11,350	34,000
Pennsylvania	310,400	29,510	101,190
Rhode Island	29,690	2,440	8,730
South Carolina	98,270	8,810	24,470
South Dakota	30,240	2,450	8,890
Tennessee	154,240	17,340	52,440
Texas	405,890	47,000	134,350
Utah	65,140	4,800	16,220
Vermont	27,240	2,250	8,010
Virginia	141,680	15,020	48,170
Washington	142,620	14,230	48,490
West Virginia	86,770	9,040	27,160
Wisconsin	185,190	16,930	62,780
Wyoming	26,390	2,250	7,760
U.S. Total	$7,141,000	710,000	$2,292,000

Note: The 1988 figures above are not comparable to prior year estimates due to retail sales and population revisions. See page 12 for updated retail sales estimates for prior years.

New motorcycle retail sales include all-terrain vehicles, scooters, and nopeds (limited speed motor-driven cycles under 50 cc which are not generally defined by state as mopeds). Excludes mopeds. New motorcycle retail sales dollars based on the manufacturers "suggested retail price" per model as published in the MIC Manufacturers Shipment Reporting System.

*The 1988 estimated annual economic value of the retail marketplace includes retail sales of motorcycles, scooters, and ATVs (new and used) and parts and accessories, dealer servicing, product advertising, vehicle financing charges, insurance premiums, dealer personnel salaries, state sales and dealer personal income taxes, and vehicle registration fees. Revenues from industry publications, corporate income taxes, personal income tax from non-dealer salaries, motorcycle and aftermarket manufacturer and distributor personnel salaries and advertising, and special events attendance are not included.

Source: "1988 Estimated Retail Sales of New Motorcycles" for each state was derived by the Motorcycle Industry Council from the MIC Manufacturers Shipment Reporting System, adjusted for retail sales. "1988 Estimated Annual Economic Value of the Motorcycle Retail Marketplace" was derived by the Motorcycle Industry Council from the percent of the annual industry economic value represented by the estimated retail sales dollars for new motorcycles in a sample of states.

NEW MOTORCYCLE RETAIL SALES BY MODEL TYPE

In 1988, estimated retail sales of new motorcycles, scooters, and ATVs were 710,000 units, valued at 2.3 billion dollars.

Off-highway motorcycles and ATVs totalled an estimated 375,000 units, or just over one half (53%) of the new retail sales units in 1988. An estimated 290,000 of these off-highway retail sales units were ATVs. Off-highway retail sales accounted for 1.0 billion dollars, or 43% of the total retail sales dollars.

New retail unit sales of on-highway motorcycles and scooters were 310,000 in 1988, or 44% of the total retail sales. On-highway retail sales accounted for 1.2 billion dollars, over half (54%) of the retail dollars in 1988. Dual purpose motorcycles represented 25,000 new unit sales and 56 million retail dollars in 1988.

ESTIMATED NEW RETAIL SALES BY MODEL TYPE, 1970-1988

Year	Total		On-Highway		Off-Highway		Dual Purpose	
	Units	Retail $	Units	Retail $	Units	Retail $	Units	Retail $
	(000's)	(000,000's)	(000's)	(000,000's)	(000's)	(000,000's)	(000's)	(000,000's)
1970	1,010	$ N/A	333	$ N/A	199	$ N/A	478	$ N/A
1971	1,240	N/A	472	N/A	226	N/A	542	N/A
1972	1,360	1,027	564	591	233	101	563	335
1973	1,520	1,250	655	719	292	161	573	370
1974	1,200	1,285	489	739	244	171	467	375
1975	940	1,209	451	819	247	188	242	202
1976	1,050	1,298	491	853	260	200	299	245
1977	1,080	1,487	568	1,015	283	287	229	185
1978	975	1,432	482	1,005	326	276	167	151
1979	1,085	1,752	606	1,277	332	321	147	154
1980	1,070	1,971	654	1,526	313	330	103	115
1981	1,065	2,160	614	1,621	370	446	81	93
1982	990	1,991	520	1,389	415	528	55	74
1983	1,185	2,353	550	1,468	580	811	55	74
1984	1,305	2,838	550	1,691	700	1,061	55	86
1985	1,260	2,787	520	1,508	695	1,207	45	72
1986	1,075	2,575	440	1,322	605	1,200	30	53
1987	970	2,553	438	1,348	505	1,152	27	53
1988	710	2,292	310	1,248	375	988	25	56

Note: See page 6 for model type definitions.

On-Highway includes scooters and nopeds, and excludes mopeds. Estimated 1982-1988 scooter retail sales units and dollars are as follows:

1982 — 15,000 units, $ 17,100,000
1983 — 25,000 units, $ 19,700,000
1984 — 65,000 units, $ 55,325,000
1985 — 115,000 units, $ 89,100,000
1986 — 135,000 units, $141,300,000
1987 — 153,000 units, $129,681,000
1988 — 90,000 units, $ 94,923,000

Estimates prior to 1982 are not available.

Off-Highway includes three and four-wheeled ATVs and competition motorcycles. 1982-1988 estimated ATV retail unit and dollar sales are as follows:

1982 — 250,000 units, $321,000,000
1983 — 425,000 units, $599,675,000
1984 — 550,000 units, $848,650,000
1985 — 550,000 units, $989,450,000
1986 — 480,000 units, $990,240,000
1987 — 405,000 units, $959,445,000
1988 — 290,000 units, $796,630,000

Estimates prior to 1982 are not available.

Retail $ — The estimated retail dollar volume is based on the manufacturer's "suggested retail price" per model as published in the MIC Manufacturers Shipment Reporting System.

Source: Units — MIC estimate derived from motorcycle import, production, wholesale, inventory, and registration statistics.
Retail Dollars — Based on the manufacturer's "suggested retail price" as published in the MIC Manufacturers Shipment Reporting System.

U.S. PRODUCTION, IMPORT, WHOLESALE, AND NEW REGISTRATION SUMMARY

In 1988, an estimated 110,000 motorcycles and ATVs were manufactured in the U.S. 1988 motorcycle and scooter imports totalled 287,000 units, and ATV imports totalled an estimated 210,000 units. Wholesale sales of new motorcycles, scooters, and ATVs to dealers in 1988 were an estimated 590,000 units, valued at 1.57 billion dollars. New registrations of on-highway motorcycles, scooters, and some off-highway motorcycles and ATVs equalled 410,000 in 1988.

U.S. production, imports, wholesale sales, and new registrations are summarized below from 1970 to 1988, and in greater detail on the following pages.

U.S. PRODUCTION, IMPORT, WHOLESALE, AND NEW REGISTRATION SUMMARY, 1970-1988

Year	Estimated U.S. Production	U.S. Motorcycle Imports		Estimated U.S. ATV Imports	Estimated Wholesale Sales		New Registrations
	Units	Units	Dollars	Units	Units	Dollars	Units
	(000's)	(000's)	(000,000's)	(000's)	(000's)	(000,000's)	(000's)
1970	35	1,091	$ 308	N/A	1,040	$ 467	N/A
1971	25	1,539	495	N/A	1,340	670	928
1972	35	1,690	697	N/A	1,400	801	1,006
1973	45	1,206	570	N/A	1,580	980	1,190
1974	40	1,543	911	N/A	1,200	977	1,024
1975	40	948	711	N/A	910	900	747
1976	80	659	466	N/A	1,050	1,006	783
1977	110	860	588	N/A	1,100	1,140	849
1978	80	935	797	N/A	1,000	1,160	797
1979	120	887	870	N/A	1,090	1,405	886
1980	130	1,120	1,142	N/A	1,190	1,750	876
1981	125	1,057	1,314	N/A	1,155	1,890	828
1982	100	917	1,110	N/A	1,025	1,609	726
1983	100	540	697	N/A	1,260	2,015	811
1984	155	441	523	635	1,400	2,354	772
1985	130	733	783	683	1,290	2,281	722
1986	105	550	763	498	990	1,915	631
1987	125	318	463	320	865	1,850	550
1988	110	287	512	210	590	1,568	410

Note: Production — Includes motorcycles, scooters, and three and four-wheeled ATVs if manufactured in the U.S.

Motorcycle Imports — Includes motorcycles, scooters, and nopeds; ATVs and mopeds not included. Dollar value equals dutiable value for 1970-1979 and C.I.F. value for 1980 and subsequent years.

ATV Imports — Includes three and four-wheeled ATVs. ATVs manufactured in the U.S. not included.

Wholesale Sales — Includes motorcycles, scooters, nopeds, and three and four-wheeled ATVs. The wholesale dollar volume is based on the lowest price at which the vehicle is sold to dealers f.o.b. point of U.S. manufacture or point of entry. This wholesale price does not consider dealer discounts, special promotional allowances, rebates, or other incentives.

New Registrations — Includes first-time registrations of motorcycles, scooters, nopeds, and some off-highway motorcycles and ATVs for the three most current model years. Oklahoma registrations first became available in 1987. Incomplete Ohio registrations estimated for 1974, 1978 and subsequent years include California off-highway registrations. New York registrations not available from October 1983-December 1984.

Source: Production — MIC estimate derived from R.L. Polk & Co. new motorcycle registrations and information offered by the U.S. distributors.
Imports — U.S. Dept. of Commerce and U.S. Motorcycle Imports and U.S. Moped, Motor Scooters, 3 & 4 Wheeler Imports, Werner C. Single, Foreign Trade Services, W. New York, New Jersey.
Wholesale Sales — MIC Manufacturers Shipment Reporting System for major distributors and MIC estimate for scooters and other brands.
New Registrations — New Motorcycle Registrations, R.L. Polk & Co., Detroit, Michigan. Permission for further use must be obtained from R.L. Polk & Co.

U.S. MOTORCYCLE IMPORTS BY YEAR, COUNTRY, AND ENGINE DISPLACEMENT

In 1988, 287,000 motorcycles and scooters with a dutiable value of $512 million were imported into the United States. Of these units imported, 95.7% were from Japan, 4.2% from European countries, and 0.1% from other countries. In addition to these motorcycles and scooters, 9,600 mopeds or motorized bicycles were imported in 1988, primarily from European countries. All-terrain vehicles are not included.

The imports with relatively small engines, less than 191 cc displacement, represented 47% of the total units imported, but only 21% of the total dutiable dollar value. Imports with relatively large engines, over 490 cc displacement, represented 30% of the units imported and 53% of the total dutiable dollar volume in 1988.

U.S. MOTORCYCLE IMPORTS BY COUNTRY, 1982-1988

	1982	1983	1984	1985	1986	1987	1988
Japan							
Units	897,861	522,573	417,824	710,959	535,028	305,827	274,604
$ Value	$1,079,362,753	$ 666,284,854	$ 482,238,238	$ 737,814,137	$ 724,051,178	$ 424,612,449	$ 468,969,686
European Countries							
Units	16,100*	13,597*	17,397*	21,178*	13,748*	11,077*	12,021*
$ Value	$ 27,977,592	$ 29,266,634	$ 38,296,805	$ 42,816,389	$ 38,261,208	$ 37,865,258	$ 42,437,399
All Others							
Units	3,242*	4,043*	6,199*	1,201*	893*	970*	282*
$ Value	$ 2,827,574	$ 1,633,326	$ 2,851,599	$ 2,455,798	$ 451,164	$ 681,460	$ 377,788
Total							
Units	917,203*	540,213*	441,420*	733,338*	549,669*	317,874*	286,907*
$ Value	$1,110,167,919	$ 697,184,814	$ 523,386,642	$ 783,086,324	$ 762,763,550	$ 463,159,167	$ 511,784,873

SCOOTERS INCLUDED; ATVs EXCLUDED. Dollar Value = C.I.F. Value.

U.S. MOTORCYCLE IMPORTS BY ENGINE DISPLACEMENT, 1982-1988

	1982	1983	1984	1985	1986	1987	1988
Under 191 cc							
Units	312,891*	175,212*	191,856*	355,670*	241,250*	156,485*	133,828*
$ Value	$ 152,019,038	$ 94,634,569	$ 97,761,171	$ 176,053,176	$ 152,153,709	$ 109,835,387	$ 107,923,087
191-490 cc							
Units	182,948	75,321	67,792	164,493	148,941	68,530	64,511
$ Value	$ 198,421,920	$ 82,609,575	$ 78,049,993	$ 183,019,603	$ 218,738,761	$ 105,170,653	$ 130,736,424
491-790 cc							
Units	298,182	215,975	141,716	177,605	129,932	70,841	67,101
$ Value	$ 532,150,656	$ 362,771,480	$ 256,491,632	$ 329,283,894	$ 291,693,936	$ 171,185,050	$ 189,330,629
Over 790 cc							
Units	119,625	65,093	34,828	31,274	28,702	20,694	18,394
$ Value	$ 226,188,672	$ 153,545,173	$ 88,441,983	$ 91,724,205	$ 99,838,528	$ 75,631,655	$ 82,913,454
Unspecified							
Units	3,557	8,612	5,228	4,296	844	1,324	3,073
$ Value	$ 1,387,633	$ 3,624,017	$ 2,641,863	$ 3,005,446	$ 338,616	$ 1,336,422	$ 881,279
Total							
Units	917,203*	540,213*	441,420*	733,338*	549,669*	317,874*	286,907*
$ Value	$1,110,167,919	$ 697,184,814	$ 523,386,642	$ 783,086,324	$ 762,763,550	$ 463,159,167	$ 511,784,873

SCOOTERS INCLUDED; ATVs EXCLUDED

Dollar Value = C.I.F. Value.

*Excludes estimated imports of mopeds (motorized bicycles) as follows:

1982- 18,145 units, $ 4,384,230
1983- 21,645 units, $ 5,471,009
1984- 32,889 units, $ 8,900,146
1985- 30,174 units, $ 8,981,153
1986- 22,557 units, $ 6,984,588
1987- 23,683 units, $ 7,258,696
1988- 9,628 units, $ 3,358,684

Source: U.S. Dept. of Commerce, Domestic and International Business Administration.
U.S. Motorcycle Imports, Werner C. Single, Foreign Trade Services, W. New York, New Jersey.

NEW MOTORCYCLE WHOLESALE SALES BY MAJOR BRANDS

In 1988 estimated wholesale sales of new motorcycles and all-terrain vehicles (ATVs) to dealers by the five leading brands (Harley-Davidson, Honda, Kawasaki, Suzuki, and Yamaha) in the United States were 483,005 units, valued at a wholesale dollar volume of $1.45 billion and an estimated retail dollar volume of $1.77 billion.

Of the total units wholesaled in 1988, 41.1% were on-highway motorcycles, 53.3% were off-highway motorcycles and ATVs, and the remaining 5.6% were dual purpose motorcycles. Almost four fifths (78%) of the new motorcycles and ATVs shipped to dealers in 1988 had four-cycle engines, and about one half (55%) had an engine displacement less than 350 cubic centimeters. The five leading states in wholesale unit sales (California, Texas, New York, Pennsylvania, and Michigan) accounted for almost one third (32%) of the total U.S. wholesale sales in 1988.

NEW MOTORCYCLE WHOLESALE SALES BY MAJOR BRANDS, 1984-1988

			Units										
				Model Type			Engine Type		Displacement Size (cc)				
	Wholesale $ Volume ($000's)	Est. Retail $ Volume ($000's)	Total Units	On-Highway	Off-Highway	Dual Purpose	Two-Stroke	Four-Stroke	Under 125 cc	125-349 cc	350-449 cc	450-749 cc	750 cc & Up
1984 (% of Total Units)	$2,270,332	$2,816,370	1,310,240 (100.0%)	445,621 (34.0%)	803,877 (61.4%)	60,742 (4.6%)	220,833 (16.9%)	1,089,407 (83.1%)	251,365 (19.2%)	634,403 (48.4%)	37,280 (2.8%)	227,286 (17.4%)	159,906 (12.2%)
1985 (% of Total Units)	$2,190,187	$2,708,401	1,166,220 (100.0%)	388,488 (33.3%)	740,304 (63.5%)	37,428 (3.2%)	192,017 (16.5%)	974,203 (83.5%)	228,094 (19.6%)	530,326 (45.5%)	77,630 (6.6%)	178,056 (15.3%)	152,114 (13.0%)
1986 (% of Total Units)	$1,790,247	$2,206,015	853,426 (100.0%)	273,148 (32.0%)	555,419 (65.1%)	24,859 (2.9%)	142,586 (16.7%)	710,840 (83.3%)	136,176 (15.9%)	383,572 (44.9%)	77,269 (9.1%)	153,533 (18.0%)	102,876 (12.1%)
1987 (% of Total Units)	$1,728,223	$2,125,598	728,042 (100.0%)	237,200 (32.6%)	465,051 (63.9%)	25,791 (3.5%)	141,577 (19.4%)	586,465 (80.6%)	116,774 (16.0%)	332,303 (45.7%)	60,094 (8.3%)	117,409 (16.1%)	101,462 (13.9%)
1988 (% of Total Units)	$1,445,602	$1,769,990	483,005 (100%)	198,342 (41.1%)	257,658 (53.3%)	27,005 (5.6%)	104,825 (21.7%)	378,180 (78.3%)	71,599 (14.8%)	191,859 (39.7%)	38,265 (7.9%)	78,609 (16.3%)	102,673 (21.3%)

NEW MOTORCYCLE WHOLESALE SALES BY MAJOR BRANDS IN TEN LEADING STATES, 1984-88

	1988		1987		1986		1985		1984	
State	Rank	Units	Rank	Units	Rank	Units	Rank	Units	Rank	Units
California	1	61,327	1	88,328	1	102,749	1	131,896	1	151,150
Texas	2	29,768	3	34,433	2	42,237	2	76,864	2	90,178
New York	3	21,857	6	30,614	4	41,079	4	53,875	4	58,963
Pennsylvania	4	21,642	4	33,217	5	40,297	3	54,885	6	55,386
Michigan	5	20,733	2	36,733	3	41,944	5	53,058	5	58,942
Florida	6	17,971	7	28,994	7	31,994	7	43,580	7	50,400
Ohio	7	17,666	5	31,165	6	40,184	6	49,213	3	61,324
Georgia	8	16,329	8	24,176	8	28,534	8	37,032	9	34,451
Illinois	9	14,958	10	23,052	10	25,859	10	35,298	8	38,139
North Carolina	10	14,271	9	23,489	9	27,113	9	35,526	--	---
Alabama	--	---	--	---	--	---	--	---	10	32,690

NOTE: Includes all-terrain vehicles and nopeds (limited speed, motor-driven cycles under 50 cc's without fully operative pedals). **Excludes mopeds and scooters.** See page 6 for model type definitions.

Source: Manufacturers Shipment Reporting System, Annual Statistical Report, Motorcycle Industry Council, Inc., Irvine, California. Includes wholesale shipments to dealers by Harley-Davidson, Honda, Kawasaki, Suzuki and Yamaha.

NEW MOTORCYCLE REGISTRATIONS BY STATE

In 1988, first-time registrations of new motorcycles, scooters and ATVs for the three most current model years were 409,734, or 58%, of the estimated 710,000 retail sales. New registrations are usually issued only to street legal motorcycles. A number of states, however, issue registrations for titling purposes for off-highway motorcycles and ATVs. In 1988, new registrations of off-highway motorcycles and ATVs represented 36% of all new registrations.

New York new registrations were unavailable for 1984. Oklahoma new registrations first became available in 1987.

NEW MOTORCYCLE REGISTRATIONS BY STATE, 1983-1988

	1983	1984	1985	1986	1987	1988
Total U.S.	811,253	772,166	721,975	630,739	550,494	409,734
State						
Alabama	22,882*	26,528*	21,907*	19,261*	19,489*	10,520*
Alaska	2,267*	1,917*	1,405*	1,168*	943*	1,053*
Arizona	8,328	8,568	10,862*	18,351*	12,413*	7,225*
Arkansas	9,688*	11,775*	8,304*	5,576*	4,695*	4,630*
California	159,089*	154,367*	151,432*	132,423*	111,008*	75,289*
Colorado	10,208	8,948	6,234	5,258	4,819	3,822
Connecticut	8,668	7,709	6,136	6,183	6,064	4,472
Delaware	1,086	971	912	966	801	847
Dist. of Columbia	865	776	817	476	376	338
Florida	40,220*	41,488*	21,173	17,955	19,536	12,710
Georgia	20,112*	25,946*	30,480*	26,967*	15,755*	5,185
Hawaii	987	922	1,149	1,283	1,297	1,497
Idaho	4,797	4,741	3,164	2,012	1,740	1,213
Illinois	39,871*	38,390*	35,617*	31,333*	31,010*	21,643*
Indiana	13,762	13,181	11,052	9,000	8,443	6,335
Iowa	11,452	16,181	9,374	6,807	6,341	4,724
Kansas	10,118	8,063	6,582	5,227	4,342	2,810
Kentucky	5,219	4,548	4,901	4,674	3,898	2,839*
Louisiana	24,518*	23,097*	18,258*	14,731*	11,212*	8,242*
Maine	4,147	3,364	2,318	2,568	2,680	2,077
Maryland	8,387	9,359	9,622	8,203*	8,343*	6,882*
Massachusetts	10,044	10,365	9,542	9,591	8,780	7,730
Michigan	24,615	22,323	17,037	24,685*	10,829	24,683*
Minnesota	17,190*	15,388	8,657	6,449	7,443	5,974
Mississippi	12,600*	10,996*	10,872*	9,403*	8,107*	5,918*
Missouri	16,527*	18,957*	18,313*	14,311*	5,471	15,364*
Montana	3,483	2,432	1,622	1,193	1,013	902
Nebraska	5,448	4,576*	3,403*	2,484*	2,024	1,073
Nevada	2,184	2,431	1,820	1,578	1,666	1,459
New Hampshire	4,629	4,142	3,607	3,709	3,961	3,590
New Jersey	12,652	10,459	9,662	8,895	7,789	6,396
New Mexico	8,266*	8,663*	8,145*	6,302*	4,676*	3,189*
New York	33,844	N/A	29,978	24,440	38,530*	21,169*
North Carolina	10,484	10,529	8,495	7,660	6,993	5,125
North Dakota	3,134	2,642	2,165*	1,850*	1,452*	921*
Ohio	28,857	26,879	19,916	16,503	15,069	10,941
Oklahoma	N/A	N/A	N/A	N/A	3,576	2,606
Oregon	17,038*	18,514*	18,786*	16,460*	14,117*	8,771*
Pennsylvania	28,466	26,911*	25,427*	19,669*	14,662	11,440
Rhode Island	2,948	2,752	2,638	2,246	2,237	1,520
South Carolina	8,335	10,611*	7,907*	6,025*	6,005*	5,204*
South Dakota	4,056*	2,366*	2,814*	2,274*	1,836*	1,485*
Tennessee	10,850	13,085*	14,098*	11,749*	12,296*	10,935*
Texas	59,453*	60,544*	53,567	47,537*	37,264*	28,242*
Utah	12,277*	6,710	18,009*	10,742*	8,033*	4,569*
Vermont	2,140	2,252*	2,764*	1,850*	2,136*	1,282*
Virginia	10,227	11,908	10,452	9,025	7,692	5,742
Washington	28,459*	27,451*	25,029*	21,452*	19,975*	13,004*
West Virginia	5,411	7,534*	8,826*	7,655*	6,334*	5,765*
Wisconsin	18,536	17,734	14,569	12,905	13,796	9,258
Wyoming	2,429	2,173	2,156*	1,675*	1,527*	1,124*

* New registrations in these states include an unusually high percentage (20%-73%) of off-highway motorcycles and all-terrain vehicles.

Source: New Motorcycle Registrations, R.L. Polk & Co., Detroit, Michigan. Permission for further use must be obtained from R.L.Polk & Co.

NEW MOTORCYCLE REGISTRATIONS BY LEADING BRANDS

The nation's six major brands accounted for 99.4% of the new registrations in 1988. Honda, the leading brand during the past two decades, ranked first in 1988 with 39.0% of the registered market, followed by Yamaha with 23.0%, Kawasaki with 13.9%, and Suzuki with 13.3%. Harley-Davidson ranked fifth in 1988 with 9.4% of the new motorcycle registrations, and BMW ranked sixth with 0.8%. The market share for each of the remaining motorcycle brands distributed in the United States was reported to be less than 0.5% in 1988.

Although registrations are usually issued only to street legal motorcycles, some states issue registrations for off-highway motorcycles and ATVs for titling purposes.

NEW MOTORCYCLE REGISTRATIONS LEADING BRANDS BY MARKET SHARE, 1983-1988

	1988		1987		1986		1985		1984		1983	
Make	Rank	Market Share	Rank	Market Share	Rank	Market Share	Rank	Market Share	Rank	Market Share	Rank	Market Share
Honda	1	39.0%	1	50.8%	1	55.0%	1	58.5%	1	57.7%	1	54.8%
Yamaha	2	23.0%	2	19.8%	2	17.8%	2	15.7%	2	18.6%	2	19.0%
Kawasaki	3	13.9%	4	10.2%	4	9.7%	3	10.4%	4	8.9%	4	9.8%
Suzuki	4	13.3%	3	11.6%	3	11.1%	4	10.0%	3	10.0%	3	11.8%
Harley-Davidson	5	9.4%	5	6.3%	5	5.0%	5	4.1%	5	3.7%	5	3.3%
BMW	6	0.8%	6	0.7%	6	0.9%	6	0.8%	6	0.6%	6	0.6%

Note: The market share for other brands was less than 0.5%.

R.L. Polk new registrations include the three most current model years. Some off-highway motorcycle and all-terrain vehicle new registrations are included.

California new off-highway motorcycle and ATV registrations have been added to 1983 new registrations, so that comparisons can be made with 1984 and subsequent years which include California off-highway registrations.

New York new registrations were not available from October 1983 through December 1984.

Oklahoma new registrations first became available in 1987.

Source: New Motorcycle Registrations, R.L. Polk & Co., Detroit, Michigan. Permission for further use must be obtained from R.L. Polk & Co.

MOTORCYCLE SCRAPPAGE AND OPERABILITY RATE

The number of motorcycles, sccoters, and ATVs retired from use, or scrapped, in 1988 was an estimated 1.12 million or 15% of the 1987 population in use.

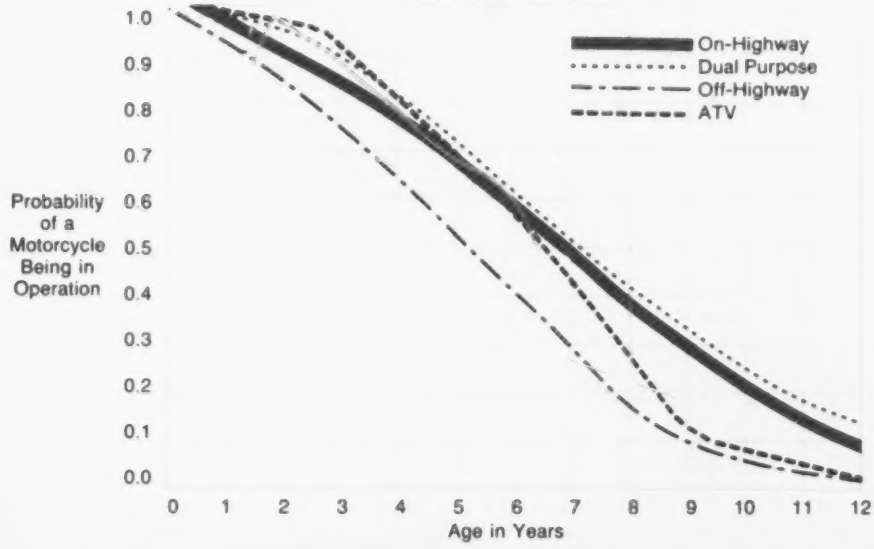
A key factor in determining average annual mileage is the motorcycle operability rate (the probability of a motorcycle being operable after a given number of years) because of the decrease in annual mileage as the vehicle ages. The operability rate for on-highway and dual purpose motorcycles tends to be higher than the rate for off-highway motorcycles.

MOTORCYCLES RETIRED FROM USE OR SCRAPPED IN 1988

Year Sold New	Est. Retail Sales (000's)	Operability Rate '87	Operability Rate '88	Estimated Population In Use (000's) '87	Estimated Population In Use (000's) '88	Estimated Number Retired From Use or Scrapped In 1988 (000's)	
1988	700		.983		688	—	
1987	960	.983	.940	944	902	42	
1986	1,057	.941	.889	995	940	55	
1985	1,230	.889	.809	1,094	995	99	
1984	1,275	.809	.718	1,031	916	115	
1983	1,095	.713	.619	781	678	103	
1982	900	.610	.496	549	446	103	
1981	999	.503	.397	502	397	105	
1980	977	.390	.287	381	280	101	
1979	1,007	.279	.207	281	208	73	
1978	921	.202	.139	186	128	58	
1977	1,031	.153	.104	158	107	51	
Before 1977				663	450	213	
				7,565	7,135	1,118	14.8% of 1987 — Population

Note: The operability rates shown above are composites of the operability rates by model type and will vary each year according to the motorcycle population by model type. Mopeds and nopeds are excluded from retail sales estimates. Includes ATVs and scooters.

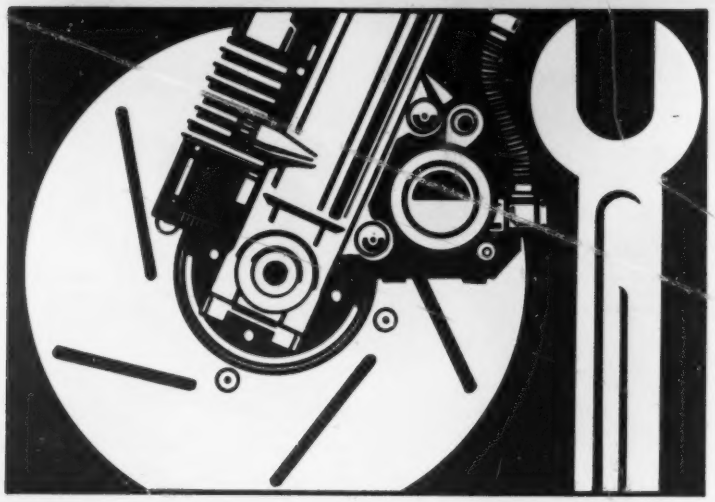
OPERABILITY RATE



OPERABILITY RATE

Age	On-Hwy.	Dual Purpose	Off-Hwy.	ATV
0.5	.98	.99	.97	.99
1.5	.92	.96	.90	.97
2.5	.86	.93	.82	.93
3.5	.79	.87	.70	.85
4.5	.72	.76	.58	.75
5.5	.64	.65	.46	.65
6.5	.55	.57	.32	.50
7.5	.45	.47	.16	.35
8.5	.35	.37	.10	.20
9.5	.27	.30	.05	.10
10.5	.19	.23	.02	.05
11.5	.13	.16	.01	.02

Source: 1987 and 1988 Estimated Motorcycle Population, Motorcycle Industry Council, Inc., Irvine, CA.
Motorcycle Survival Rate Model, an analysis of the data from the 1980 Survey of Motorcycle Ownership and Usage, updated with data from the 1985 Survey of Motorcycle Ownership and Usage, Burke Marketing Research, Inc., Cincinnati, Ohio.



Manufacturers and Distributors

MIC

PROFILE OF MAJOR U.S. MOTORCYCLE MANUFACTURERS AND DISTRIBUTORS

In 1988 the six leading brands distributed in the United States, BMW, Harley-Davidson, Honda, Kawasaki, Suzuki, and Yamaha, accounted for roughly 99% of the nation's estimated 710,000 new motorcycle, scooter, and ATV retail sales.

Four of the six major brands are manufactured primarily in Japan and have been distributing motorcycles in the U.S. for twenty to thirty years. Harley-Davidson and BMW, the fifth and sixth ranking brands, have been distributing motorcycles in the U.S. for eighty and forty years, respectively. Besides motorcycles, scooters, and ATVs, the six leading U.S. distributors also sell a wide range of other products in the U.S., including automobiles, snowmobiles, golf carts, go carts, power products, and watercraft.

PROFILE OF MAJOR U.S. MOTORCYCLE MANUFACTURERS/DISTRIBUTORS

Brand	U.S. Motorcycle Distributor	Motorcycle Manufacturer	Year of U.S. Incorporation	Other Products Sold in U.S.
BMW	BMW of North America, Inc. 300 Chestnut Ridge Road Woodcliff Lake, NJ 07675 (201) 307-4000	BMW Motorrad GmbH & Co Triebstrasse 32 8000 Munich 50 West Germany	1976	Automobiles
Harley-Davidson	Harley-Davidson Motor Co., Inc 3700 W. Juneau Avenue P.O. Box 653 Milwaukee, WI 53201 (414) 342-4680	Same as distributor	1907	Motorcycle accessories, recreational and specialized vehicles and related products.
Honda	American Honda Motor Company, Inc. 100 West Alondra Blvd. Gardena, CA 90247 (213) 327-8280	Honda Motor Co., Ltd. No. 1-1, 2 Chome, Minami Aoyama Minato-Ku, Tokyo 107, Japan Honda of America Mfg. Inc. 24000 U.S. Route 33 Marysville, Ohio 43040 (Engine Manufacturing Facility) 12500 Meranda Road Ana, Ohio 45302	1959	Automobiles, all-terrain vehicles, motor scooters, accessories for motorcycles and products above, power products (generators, rototillers, outboards, lawnmowers, riding lawnmowers, lawn tractors, snow throwers, water pumps).
Kawasaki	Kawasaki Motors Corp., U.S.A. 9950 Jeronimo Road Irvine, CA 92718-2016 (714) 770-0400	Kawasaki Heavy Industries, Ltd. 1-1, Kawasaki-cho Akashi 673, Hyogoken, Japan Kawasaki Motors Mfg. Corp., U.S.A P.O. Box 519 Marysville, Missouri 64468 Kawasaki Motors Manufacturing 6600 N.W. 27th St. Lincoln, Nebraska 68524	1967	All-terrain vehicles, Jet Ski®, Jet Mate Watercraft, accessories for motorcycles and products above small engines, generators.
Suzuki	American Suzuki Motor Corp. 3251 East Imperial Hwy. Brea, CA 92621 (714) 996-7040	Suzuki Motor Co., Ltd. Hamamatsu-Nishi, P.O. Box 1 432-91 Hamamatsu, Japan	1963	Automobiles, all-terrain vehicles, outboard motors, generators, accessories for motorcycles and products above.
Yamaha	Yamaha Motor Corp., U.S.A. 6555 Katella Ave. Cypress, CA 90630 (714) 761-7300	Yamaha Motor Co., Ltd. 2500 Shingai, Iwata-Shi Shizuoka-Ken, 438 Japan	1960	Snowmobiles, go cart engines, go carts, golf carts, scooters, all-terrain vehicles, outboard engines, water vehicles, stern drives, outdoor power products (generators, snowblowers, lawnmowers), accessories for motorcycles and products above.

Source: Information obtained by the Motorcycle Industry Council from the U.S. distributors above.

OTHER U.S. MOTORCYCLE MANUFACTURERS/ DISTRIBUTORS

While the six major brands accounted for roughly 99% of the 1988 retail sales in the United States, the remaining 1% of new motorcycle and scooter sales are distributed among over 20 brands.

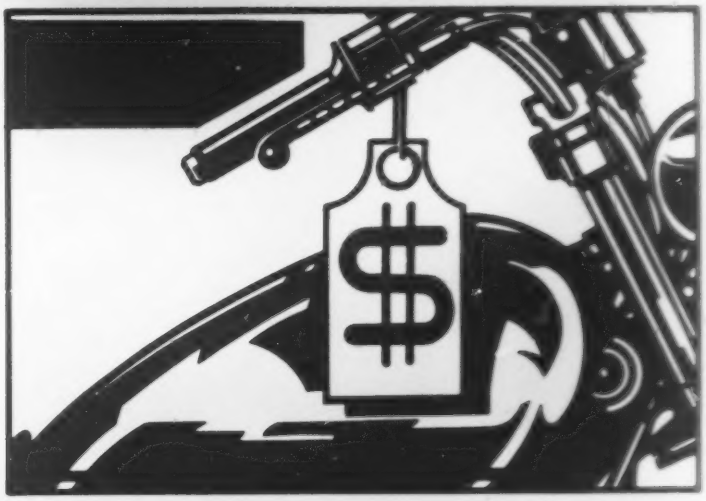
Although the U.S. motorcycle market share for most of these brands listed below is quite small, some of these brands are greater contributors to foreign markets.

OTHER 1989 U.S. MOTORCYCLE MANUFACTURERS/DISTRIBUTORS

BRAND	PRIMARY U. S. MANUFACTURER/DISTRIBUTOR	COUNTRY OF MANUFACTURE
ATK	ATK Leitner Corporation 723 Laguna Canyon Road Laguna Beach, California 92651 (714) 497-7525	U.S.
Beta	Cosmopolitan Motors 301 Jacksonville Rd. Hatboro, Pennsylvania 19040 (215) 672-9100	Italy
Bimota	Cosmopolitan Motors 301 Jacksonville Rd. Hatboro, Pennsylvania 19040 (215) 672-9100	Italy
Cagiva	Cagiva North America, Inc. 5 Washington Avenue Fairfield, NJ 07006 (201) 882-9141	Italy
Ducati	Cagiva North America, Inc. 5 Washington Avenue Fairfield, NJ 07006 (201) 882-9141	Italy
E-Z Rider	KEZ Industries, Inc. 70 Herbert Avenue Closter, New Jersey 07624 (201) 767-5320	U.S.
Haul Master	CHI Industries P.O. Box 1148 Benton Harbor, Michigan 49022 (616) 849-3400 (800) 253-1030	U.S.
Husqvarna	Cagiva North America, Inc. 5 Washington Avenue Fairfield, NJ 07006 (201) 882-9141	Italy

BRAND	PRIMARY U.S. MANUFACTURER/DISTRIBUTOR	COUNTRY OF MANUFACTURE
Italjet	Italjet U.S.A. (Strada Int'l.) 13148 Saticoy Street N. Hollywood, California 91605-3495 (818) 982-2000	Italy
Jawa	American Jawa, Ltd. 185 Express Street Plainview, L.I., New York 11803 (516) 938-3210	Czechoslovakia
KTM	KTM America 1906 Broadway Lorain, Ohio 44052 (216) 244-2726	Austria
Lambretta	Cosmopolitan Motors 301 Jacksonville Road Hatboro, Pennsylvania 19040 (215) 672-9100	Spain
Maely	Maely Industries 8580 Bedford Motorway Corona, California 91719 (714) 735-0540	U.S.
Matchless	Slater Brothers P.O. Box 1 Mica, Washington 99023 (509) 924-5131	England
Montesa	Cosmopolitan Motors 301 Jacksonville Road Hatboro, Pennsylvania 19040 (215) 672-9100	Spain
Moto Guzzi	Benelli/Moto Guzzi North America 1501 Caton Avenue Baltimore, Maryland 21227 (301) 646-6400	Italy
Motomarina	Marina Mobili Inc. P.O. Box 347 146 West Commercial Ave. Moonachie, N.J. 07074-1794 (201) 438-5700	Italy
Moto Morini	Herdan Corporation Route 61 Port Clinton, Pennsylvania 19549 (215) 562-3155	Italy
Riva	Yamaha Motor Corp., U.S.A. 6555 Katella Avenue Cypress, California 90630 (714) 761-7300	Japan
Strociek	Strociek Engineering 10485 Product Drive Rockford, Illinois 61111 (815) 654-0141	U.S.

NOTE: This list includes only those companies manufacturing and/or distributing motorcycles in the U.S. as of June 1, 1989. Although this information was obtained from the most authoritative sources available (individual companies were contacted by the Motorcycle Industry Council), the Motorcycle Industry Council is not responsible for accuracy or completeness.



The Retail Marketplace

MOTORCYCLE RETAIL OUTLETS, EMPLOYEES, AND PAYROLL

Of the estimated 10,995 retail outlets selling motorcycles and related products in the U.S. in 1989, 37% are retail outlets franchised to sell new motorcycles, scooters, or all-terrain vehicles (ATVs), and 63% are retail outlets specializing in motorcycle related parts, accessories, riding apparel, used vehicles, or service, but not franchised to sell new motorcycles, scooters or ATVs.

Motorcycle retail outlets employ an estimated 52,795 employees at an estimated annual payroll of $803 million, including owner and manager salaries and advances.

In most states, franchised retail motorcycle dealers have formed nonprofit associations to engage in government relations and other activities for the good of the motorcycle industry in their state. The MIC recognizes and supports these state associations with several information exchange programs. The addresses of the state associations are listed on page 44 of this publication.

	1989 Franchised Motorcycle Retail Outlets			1989 Non-Franchised Motorcycle Retail Outlets			1989 Total Motorcycle Retail Outlets		
	# Of Outlets	Est. # Of Employees	Est. Annual Employee Payroll ($000's)	# Of Outlets	Est. # Of Employees	Est. Annual Employee Payroll ($000's)	# Of Outlets	Est. # Of Employees	Est. Annual Employee Payroll ($000's)
Total U.S.	**4,056**	**31,372**	**$ 507,990**	**6,939**	**21,423**	**$ 294,995**	**10,995**	**52,795**	**$ 802,985**
State									
Alabama	69	566	$ 8,813	65	189	$ 2,352	134	755	$ 11,165
Alaska	32	266	4,531	18	65	992	50	331	5,523
Arizona	48	398	6,796	113	407	6,224	161	805	13,020
Arkansas	55	451	7,025	61	177	2,208	116	628	9,233
California	392	3,254	55,504	839	3,020	46,215	1,231	6,274	101,719
Colorado	78	647	11,044	115	414	6,335	193	1,061	17,379
Connecticut	42	328	5,549	86	206	3,316	128	534	8,865
Delaware	9	70	1,189	17	41	655	26	111	1,844
D.C.	0	0	0	4	10	154	4	10	154
Florida	157	1,287	20,052	289	838	10,459	446	2,125	30,511
Georgia	100	820	12,772	95	276	3,438	195	1,096	16,210
Hawaii	6	50	850	29	104	1,597	35	154	2,447
Idaho	47	390	6,655	45	162	2,479	92	552	9,134
Illinois	159	1,081	16,736	332	1,096	13,541	491	2,177	30,277
Indiana	113	768	11,894	256	845	10,441	369	1,613	22,335
Iowa	76	517	8,000	191	630	7,790	267	1,147	15,790
Kansas	73	496	7,684	91	300	3,712	164	796	11,396
Kentucky	49	402	6,258	120	348	4,343	169	750	10,601
Louisiana	62	508	7,919	86	249	3,112	148	757	11,031
Maine	38	296	5,021	56	134	2,159	94	430	7,180
Maryland	45	351	5,946	61	146	2,352	106	497	8,298
Massachusetts	62	484	8,192	140	336	5,397	202	820	13,589
Michigan	165	1,122	17,368	319	1,053	13,011	484	2,175	30,379
Minnesota	95	646	10,000	178	587	7,260	273	1,233	17,260
Mississippi	48	394	6,131	46	133	1,665	94	527	7,796
Missouri	91	619	9,579	127	419	5,180	218	1,038	14,759
Montana	50	415	7,080	38	137	2,093	88	552	9,173
Nebraska	63	428	6,631	41	135	1,672	104	563	8,303
Nevada	29	241	4,106	31	112	1,708	60	353	5,814
New Hampshire	41	320	5,417	45	108	1,735	86	428	7,152
New Jersey	80	624	10,570	152	365	5,860	232	989	16,430
New Mexico	31	257	4,389	41	148	2,258	72	405	6,647
New York	194	1,513	25,633	408	979	15,730	602	2,492	41,363
North Carolina	102	836	13,028	115	334	4,162	217	1,170	17,190
North Dakota	36	245	3,789	26	86	1,060	62	331	4,849
Ohio	159	1,081	16,736	544	1,795	22,188	703	2,876	38,924
Oklahoma	53	435	6,769	85	247	3,076	138	682	9,845
Oregon	70	581	9,912	106	382	5,839	176	963	15,751
Pennsylvania	210	1,638	27,747	401	962	15,460	611	2,600	43,207
Rhode Island	11	86	1,453	26	62	1,002	37	148	2,455
South Carolina	46	377	5,875	67	194	2,425	113	571	8,300
South Dakota	33	224	3,474	22	73	897	55	297	4,371
Tennessee	84	689	10,729	113	326	4,089	197	1,017	14,818
Texas	224	1,837	28,610	308	893	11,147	532	2,730	39,757
Utah	39	324	5,522	45	162	2,479	84	486	8,001
Vermont	23	179	3,039	33	79	1,272	56	258	4,311
Virginia	78	640	9,962	95	276	3,438	173	916	13,400
Washington	87	722	12,319	129	464	7,106	216	1,186	19,425
West Virginia	39	304	5,153	46	110	1,773	85	414	6,926
Wisconsin	125	850	13,158	227	749	9,258	352	1,599	22,416
Wyoming	38	315	5,381	16	58	881	54	373	6,262

Note: A **franchised motorcycle outlet** is defined as a motorcycle retail outlet franchised to sell new motorcycles, scooters, or all-terrain vehicles (ATVs). A **non-franchised motorcycle outlet** is defined as a motorcycle retail outlet specializing in the sale of either motorcycle related parts, accessories, riding apparel, used vehicles, or service, but not franchised to sell new motorcycles, scooters, or ATVs. Because of differences in list sources, direct comparisons should not be made between the number of **non-franchised** outlets each year.

Source: 1989 Motorcycle Retail Outlet Audit, Motorcycle Industry Council, Inc., Irvine, California, August 1989.
1988 Motorcycle Retail Outlet Profile Survey, Motorcycle Industry Council, Inc., Irvine, California, June 1989.

MOTORCYCLE OUTLET RETAIL SALES

1988 motorcycle, scooter and ATV related sales and services by all retail outlets nationwide are estimated to be $5.0 billion, of which $4.0 billion were generated by outlets franchised to sell new motorcycles, scooters and ATVs, and $1.0 billion by non-franchised motorcycle outlets which include parts, accessory, used vehicle and service stores.

New motorcycles, scooters, and ATVs represented almost half (46%) of the total 1988 related retail sales and services. Parts, accessories, and riding apparel represented about 31%, used vehicles 12%, and service labor 10%. Other related sales, such as insurance premiums and extended warranties, accounted for about 2% of the total motorcycle, scooter and ATV related retail sales and services.

The distribution of franchised and non-franchised motorcycle outlets by the 1988 total motorcycle and ATV related retail sales and services is shown below.

1988 ESTIMATED RETAIL SALES BY U.S. MOTORCYCLE OUTLETS

1988 Estimated Motorcycle Related Retail Sales

	Franchised M/C Outlets	% of Total	Non-Franchised M/C Outlets	% of Total	All Motorcycle Retail Outlets	% of Total
New Motorcycles, Scooters & ATVs	$2,292,000,000	57.6%	$ 0	0.0%	$2,292,000,000	46.1%
Used Motorcycles, Scooters & ATVs	477,500,000	12.0%	100,300,000	10.1%	577,800,000	11.6%
Parts, Accessories, & Riding Apparel	831,600,000	20.9%	696,200,000	70.1%	1,527,800,000	30.7%
Service Labor	290,400,000	7.3%	188,700,000	19.0%	479,100,000	9.7%
Other M/C Related Sales	87,500,000	2.2%	7,900,000	0.8%	95,400,000	1.9%
Total M/C Related Sales	$3,979,000,000	100.0%	$ 993,100,000	100.0%	$4,972,100,000	100.0%

NOTE: Comparisons can not be made with prior years due to revisions in new vehicle sales estimates and differences in dealer list sources. See page 24 for outlet definitions.

DISTRIBUTION OF MOTORCYCLE OUTLETS BY 1988 RETAIL SALES

Distribution of Franchised Motorcycle Outlets By 1988 Total Related Retail Sales & Services

Distribution of Non-Franchised Motorcycle Outlets By 1988 Total Related Retail Sales & Services

Source: 1988 Motorcycle Retail Outlet Audit, Motorcycle Industry Council, Inc., Irvine, California, August 1988.
1988 Motorcycle Retail Outlet Profile Survey, Motorcycle Industry Council, Inc., Irvine, California, June 1989.

MOTORCYCLE RETAIL OUTLET PROFILE

In 1988 the typical franchised motorcycle outlet employed an average of 7.6 persons annually at an average annual payroll of $125,000. The franchised motorcycle outlet had been in business at the same location for an average of 12 years and under its current ownership for an average of 11 years. Franchised motorcycle outlets sold an average of 126 new and 31 used motorcycle, scooter, and ATV units in 1988. The average total motorcycle related sales and services for a franchised motorcycle outlet was $600,000 in 1988.

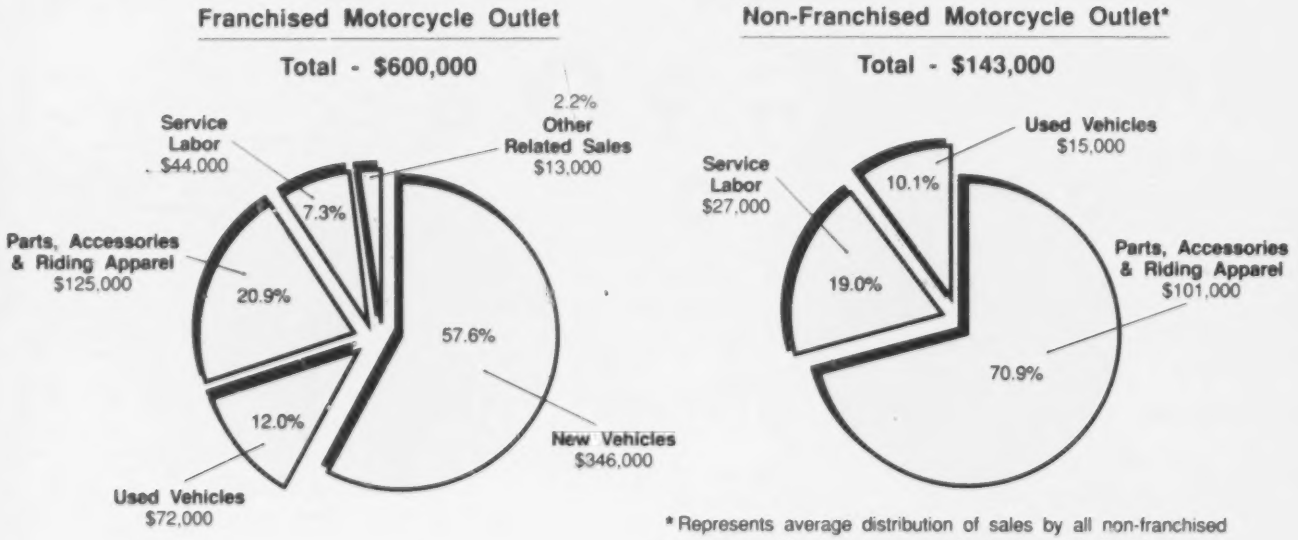
In 1988 the typical non-franchised motorcycle outlet employed an average of 3.1 persons annually at an average annual payroll of $43,000. The non-franchised motorcycle outlets had been in business at the same location for an average of 6 years and under its current ownership for an average of 8 years. The average total motorcycle related sales and services for a non-franchised motorcycle outlet was $143,000 in 1988. The distribution by type of motorcycle related sales and services for both franchised and non-franchised outlets is shown below.

1988 MOTORCYCLE RETAIL OUTLET PROFILE

	Franchised M/C Outlet	Non-Franchised M/C Outlet
	Average	Average
Number of Employees	7.6	3.1
Full-Time	6.5	2.3
Part-Time	1.1	0.8
Employee Payroll (Including owner's and mgr's salary and advances)	$125,000	$43,000
Years At Same Location (Under current & previous ownership)	12.0	6.0
Years Under Current Ownership (Whether or not at this location)	11.0	8.0
Advertising & Promotional Expenditures	$9,000	$1,200
New Motorcycle, Scooter, & ATV Unit Sales	126	N/A
Used Motorcycle, Scooter, & ATV Unit Sales	31	N/A
Number of New Brands Carried	1.6	N/A

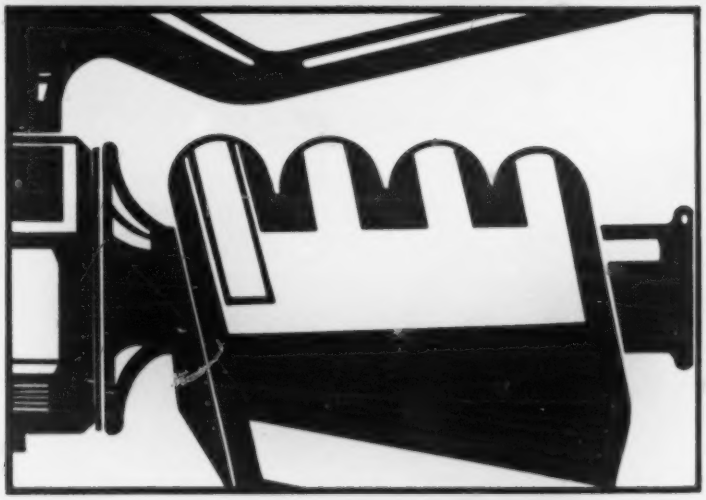
Note: See page 24 for outlet definitions

DISTRIBUTION OF MOTORCYCLE RELATED SALES PER OUTLET



* Represents average distribution of sales by all non-franchised outlets combined and may not be typical of indiviual motorcycle parts, accessory, or service outlets.

Source: 1988 Motorcycle Retail Outlet Profile Survey, Motorcycle Industry Council, Inc., Irvine, California, June 1989.



Motorcycle Usage

MIC

U.S. MOTORCYCLE USAGE ON-HIGHWAY AND OFF-HIGHWAY BY STATE

Of the 7.1 million motorcycles, scooters and ATVs in use in 1988, it is estimated that 3.76 million were used on public roads and 3.95 million were used off-highway some of the time.

Of the 3.76 million motorcycles used on-highway, the majority (87%) were on-highway motorcycles. Dual purpose motorcycles accounted for 7% of the motorcycles used on-highway.

Of the 3.95 million motorcycles and ATVs used off-highway at some time, the majority were off-highway motorcycles and ATVs (81%), while dual purpose motorcycles accounted for 12%. Only 7% of the motorcycles used off-highway at some time were on-highway motorcycles.

MOTORCYCLES USED ON AND OFF-HIGHWAY IN 1988

	U.S. Total	Model Type		
		On-Highway	Off-Highway	Dual Purpose
Total Motorcycles in Use	7,135,000	3,385,000	3,190,000	560,000
(% of total in use)	(100%)	(100%)	(100%)	(100%)
Motorcycles Used On-Highway at Some Time	3,764,000	3,280,000	220,000	264,000
(% of total in use)	(53%)	(97%)	(7%)	(47%)
Motorcycles Used Off-Highway at Some Time	3,951,000	277,400	3,190,000	483,600
(% of total in use)	(55%)	(8%)	(100%)	(86%)

MOTORCYCLE USAGE BY STATE IN 1988

State	Total Motorcycles In Use	Motorcycles Used On-Highway At Some Time	Motorcycles Used Off-Highway At Some Time
Alabama	154,400	63,700	103,900
Alaska	38,100	9,100	32,500
Arizona	115,600	54,400	70,900
Arkansas	137,800	46,000	103,200
California	891,000	518,600	446,700
Colorado	101,300	54,800	56,300
Connecticut	77,400	49,700	33,400
Delaware	14,100	7,200	7,900
D.C.	1,800	1,700	100
Florida	295,000	175,100	143,900
Georgia	215,700	101,900	130,900
Hawaii		Not Available	
Idaho	59,200	23,300	43,000
Illinois	248,500	168,600	98,600
Indiana	192,200	116,100	90,300
Iowa	126,100	87,700	47,700
Kansas	73,600	43,900	35,900
Kentucky	95,100	41,400	61,400
Louisiana	140,200	52,300	98,800
Maine	56,500	29,600	31,300
Maryland	88,000	52,300	42,700
Mass.	120,100	75,300	53,300
Michigan	316,300	160,100	179,200
Minnesota	166,900	90,200	89,300
Mississippi	87,700	29,300	65,500
Missouri	145,800	59,700	97,400
Montana	41,400	16,000	30,200
Nebraska	57,100	27,700	34,400
Nevada	40,800	20,300	24,000
N.H.	59,300	33,700	29,800
New Jersey	134,000	76,200	68,100
New Mexico	51,000	25,900	30,100
New York	325,800	194,200	155,500
North Carolina	166,100	71,200	108,200
North Dakota	29,500	15,200	17,200
Ohio	289,900	166,500	144,200
Oklahoma	105,700	51,600	64,900
Oregon	118,100	53,900	74,600
Pennsylvania	288,700	141,000	170,600
Rhode Island	23,100	17,300	7,400
South Carolina	71,000	37,300	39,200
South Dakota	30,300	16,200	16,900
Tennessee	171,400	68,600	117,400
Texas	466,300	259,700	244,700
Utah	92,400	35,400	67,000
Vermont	21,700	10,000	13,300
Virginia	144,900	77,200	79,300
Washington	161,200	86,900	88,700
West Virginia	78,700	24,600	61,100
Wisconsin	183,100	115,900	81,200
Wyoming	25,100	9,500	18,400
U.S. Totals	7,135,000	3,764,000	3,951,000

Note: See page 6 for model type definitions.
Includes scooters and ATVs, and excludes mopeds and nopeds.
The 1984 - 1988 estimates are comparable only to the 1980 and revised 1979 estimates.

Source: 1988 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Irvine, CA.

PUBLIC LAND AND OFF-HIGHWAY MOTORCYCLE STATISTICS BY STATE

Excluding Alaska which is predominantly public land, over one fifth (22%) of the total U.S. acreage, or 419 million acres, is public land managed by Federal and state government. Of this 419 million acres, 86% is in the western states.

In 1988 an estimated 4.0 million motorcycles and ATVs were used for off-highway recreational purposes. In 1988 the off-highway motorcycle and ATV industry generated an estimated $3.4 billion in consumer sales and services, and state taxes and licensing, of which $1.1 billion is attributed to the retail sales of 422,000 new motorcycles and ATVs.

1988 PUBLIC LAND AND OFF-HIGHWAY MOTORCYCLE STATISTICS BY STATE

State	(1) Public Land Acreage				(2)	(3)	(4)	Off-Hwy Mc. Penetration	
	Total Acreage	Fed. Gov't.	State Gov't.	% of State	1988 Sales of New Mcs. Used Off-Hwy At Some Time	Total Mcs. Used Off-Hwy At Some Time	1988 Est. Annual Economic Value Of Off-Hwy Retail Mrktplace	Off-Hwy Mcs. Per 100 Pop.	Off-Hwy Mcs. Per 1000 Public Acres
	(000)	(000)	(000)				($000)		
Alabama	32,678	1,132	48	3.6	10,900	103,900	$ 82,666	2.5	88.1
Alaska	365,482	318,357	3,132	88.0	4,200	32,500	52,807	6.2	0.1
Arizona	72,688	31,673	79	43.7	4,700	70,900	46,349	2.0	2.2
Arkansas	33,599	3,399	44	10.2	15,400	103,200	127,826	4.3	30.0
California	100,207	46,323	1,247	47.5	46,600	446,700	364,499	1.6	9.4
Colorado	66,486	24,189	328	36.9	5,200	56,300	45,391	1.7	2.3
Connecticut	3,135	14	181	6.2	3,700	33,400	29,778	1.0	171.3
Delaware	1,266	30	11	3.2	1,300	7,900	9,949	1.2	192.7
Dist. of Columbia	39	11	N/A	28.2	N/A	100	N/A	0.0	9.1
Florida	34,721	4,280	272	13.1	13,800	143,900	95,912	1.2	31.6
Georgia	37,295	2,299	61	6.3	18,300	130,900	122,965	2.1	55.5
Hawaii	4,106	687	25	17.3	N/A	N/A	N/A	0.0	0.0
Idaho	52,933	33,759	93	64.0	5,000	43,000	53,068	4.3	1.3
Illinois	35,795	500	335	2.3	8,700	98,600	63,333	0.8	118.1
Indiana	23,158	437	54	2.1	9,200	90,300	64,477	1.6	183.9
Iowa	35,860	160	83	0.7	5,100	47,700	41,476	1.7	196.3
Kansas	52,511	582	37	1.2	2,400	35,900	27,228	1.4	58.0
Kentucky	25,512	1,401	43	5.7	7,700	61,400	61,913	1.6	42.5
Louisiana	28,868	1,181	38	4.2	8,600	98,800	71,026	2.2	81.1
Maine	19,848	150	72	1.1	3,000	31,300	33,294	2.6	141.0
Maryland	6,319	197	270	7.4	6,600	42,700	48,042	0.9	91.4
Massachusetts	5,035	83	265	6.9	7,000	53,300	50,130	0.9	153.2
Michigan	36,492	3,529	251	10.4	21,000	179,200	170,331	1.9	47.4
Minnesota	51,206	3,460	3,236	13.1	10,200	89,300	81,874	2.1	13.3
Mississippi	30,223	1,678	21	5.6	7,500	65,500	64,265	2.5	38.6
Missouri	44,248	2,072	105	4.9	8,900	97,400	73,519	1.9	44.7
Montana	93,271	28,236	51	30.3	3,600	30,200	33,574	3.8	1.1
Nebraska	49,032	714	147	1.8	2,400	34,400	25,232	2.1	40.0
Nevada	70,264	59,815	145	85.3	2,800	24,000	24,450	2.3	0.4
New Hampshire	5,769	740	29	13.3	2,800	29,800	28,577	2.7	38.8
New Jersey	4,813	151	298	9.3	9,600	68,100	70,211	0.9	151.7
New Mexico	77,766	25,871	119	33.4	2,900	30,100	28,764	2.0	1.2
New York	30,681	1,460	256	5.6	15,400	155,500	123,106	0.9	90.6
No. Carolina	31,403	2,219	124	7.5	14,400	108,200	99,386	1.7	46.2
North Dakota	44,452	1,942	15	4.4	1,000	17,200	10,095	2.6	8.8
Ohio	26,222	322	193	2.0	14,400	144,200	106,050	1.3	280.0
Oklahoma	44,088	867	95	2.2	4,200	64,900	40,856	2.0	67.5
Oregon	61,599	30,031	89	48.9	8,200	74,600	69,180	2.7	2.5
Pennsylvania	28,804	639	282	3.2	20,000	170,600	157,342	1.4	185.2
Rhode Island	677	5	9	2.1	900	7,400	7,138	0.7	528.6
So. Carolina	19,374	1,169	79	6.4	6,200	39,200	52,412	1.1	31.4
So. Dakota	48,882	2,733	92	5.8	1,600	16,900	15,475	2.4	6.0
Tennessee	26,728	1,988	133	7.9	12,900	117,400	100,754	2.4	55.4
Texas	168,218	3,335	206	2.1	22,700	244,700	159,129	1.5	69.1
Utah	52,697	33,569	116	63.9	3,600	67,000	41,492	4.0	2.0
Vermont	5,937	322	171	8.3	1,600	13,300	14,867	2.4	27.0
Virginia	25,496	2,455	53	9.8	10,300	79,800	71,823	1.3	31.8
Washington	42,694	12,459	249	29.8	8,000	88,700	58,914	1.9	7.0
West Virginia	15,411	1,165	206	8.9	7,800	61,100	67,736	3.3	44.6
Wisconsin	35,011	1,890	119	5.7	7,900	81,200	64,220	1.7	40.4
Wyoming	62,343	31,431	120	50.6	1,800	18,400	18,433	3.8	0.6
U.S. Total	2,271,342	727,111	13,727	32.6	422,000	3,951,000	$ 3,365,334	1.6	5.3

Note: The 1988 sales, population, and economic figures above are not comparable to prior year estimates due to sales and population revisions. Includes competition motorcycles and three and four-wheeled all-terrain vehicles.

Source: (1) Statistical Abstract of the United States, 1988, U.S. Department of Commerce, Bureau of Census. Includes state park and recreation areas only.
(2) Derived from MIC Manufacturers Shipment Reporting System, 1988 Annual Report.
(3) 1988 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Irvine, CA.
(4) Derived from "Economic Value of the Motorcycle Retail Marketplace," on page 11, by M.I.C. Includes retail sales of motorcycles and ATVs (new and used) and parts and accessories, dealer servicing, product advertising, vehicle financing charges, insurance premiums, dealer personnel salaries, state sales and dealer personal income taxes, and vehicle registration fees.

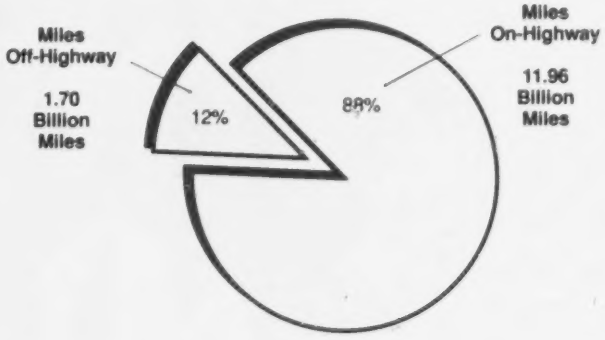
MILES TRAVELED ON AND OFF-HIGHWAY BY MODEL TYPE

It is estimated that the 7.1 million motorcycles, scooters, and ATVs in use traveled roughly 13.7 billion miles (including miles traveled off-highway), compared to an estimated 1,981 billion miles traveled by all other motor vehicles in 1988. 88% of the total motorcycle mileage in 1988 was on public highways and the remaining 12% was off-highway. On-highway motorcycles accounted for the majority (85%) of motorcycle travel, while travel on dual purpose and off-highway motorcycles, including ATVs, represented 5% and 10% respectively.

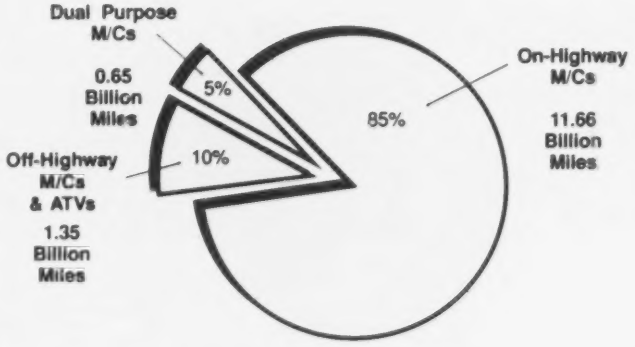
The majority (97%) of motorcycle mileage on public roads was accumulated by on-highway motorcycles, while only 3% of the mileage was traveled on dual purpose motorcycles. Off-highway motorcycles and ATVs accumulated over three fourths (79%) of the miles traveled off-highway, and the remaining 21% was divided between dual purpose motorcycles with 15% and on-highway motorcycles with 6%.

13.7 BILLION MOTORCYCLE MILES TRAVELED IN 1988

Miles On-Highway and Off-Highway

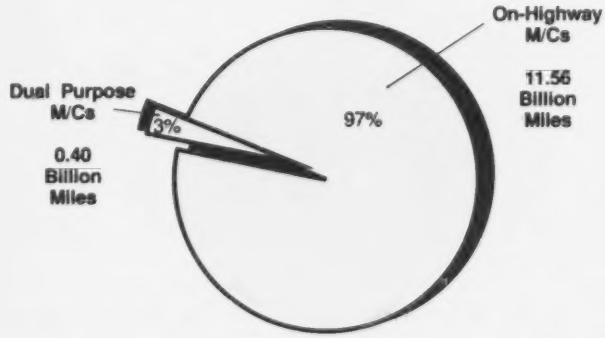


Miles by Model Type

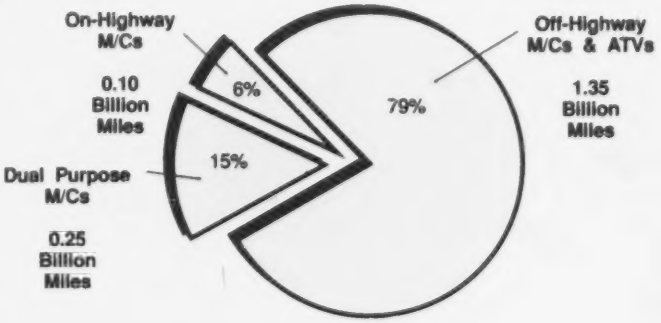


ON & OFF-HIGHWAY MILEAGE BY MODEL TYPE

Mileage On-Highway



Mileage Off-Highway



Note: The 1988 figures above are comparable only to 1987, 1986, 1985, and 1980 estimates.

Source: Derived by the Motorcycle Industry Council from the following sources:
1988 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Irvine, CA.
1985 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research,Inc., Cincinnati, Ohio. February 1986.

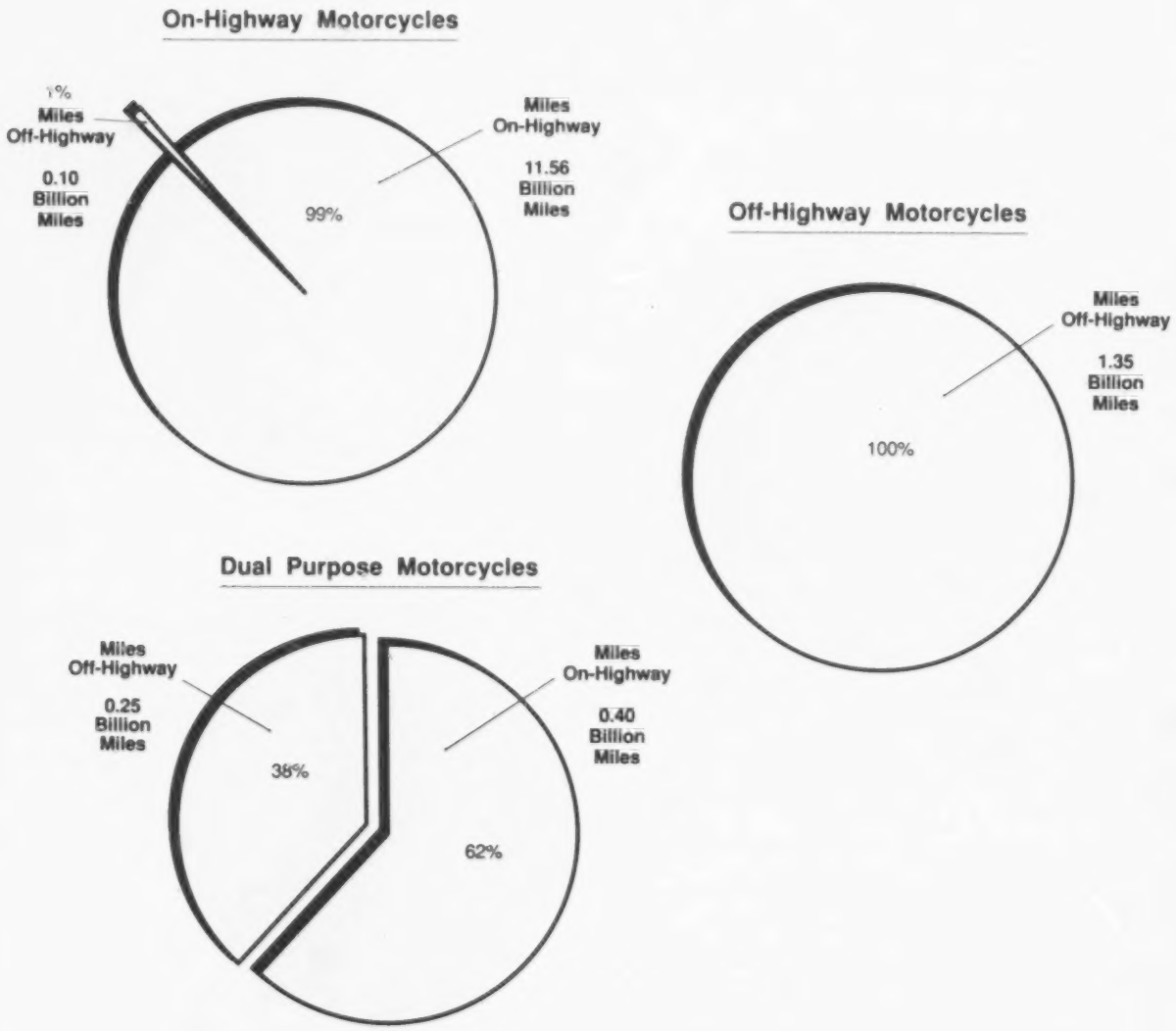
MILES TRAVELED BY MODEL TYPE FOR ON AND OFF-HIGHWAY

Of the total miles traveled by on-highway motorcycles in 1988, it is estimated that 99% was on public highways and the remaining 1% off-highway.

It is assumed that all of the mileage by off-highway motorcycles and ATVs was off public roads since these vehicles do not comply with the Federal Motor Vehicle Safety Standards for use on public roads.

Mileage by dual purpose motorcycles was somewhat greater on-highway (62%) than mileage off-highway (38%) in 1988.

ON & OFF-HIGHWAY MILEAGE BY MODEL TYPE



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MOTORCYCLE AVERAGE ANNUAL MILEAGE

In 1988 motorcycles ridden on-highway traveled an average of 3,374 miles. On-highway motorcycles tend to travel more than twice the distance traveled by dual purpose motorcycles on public highways. Motorcycles and ATVs ridden off-highway traveled an average of 430 miles in 1988. Off-highway motorcycles and ATVs combined tend to travel about the same distance off-highway as dual purpose motorcycles.

Based on 1985 consumer research, the majority of on-highway (79%) and off-highway (73%) riding occurred in the spring and summer. Riding in rural areas accounted for 41% of the miles ridden on-highway and 65% of the miles ridden off-highway. Weekend riding accounted for about half (52%) of on-highway riding and two thirds (68%) of off-highway riding.

AVERAGE ANNUAL MILEAGE TRAVELED IN 1988

Average Annual Mileage Traveled in 1988	Total Motorcycles	On-Highway Motorcycles	Off-Highway Motorcycles & ATVs	Dual Purpose Motorcycles
On-Highway	3,374	3,525	—	1,505
Off-Highway	430	357	425	509

ANNUAL MILEAGE BY SEASON, RIDING AREA, WEEKENDS

	Average % of Annual Mileage*	
	On-Highway	Off-Highway
By Season		
Spring	27%	28%
Summer	52%	45%
Fall	16%	18%
Winter	5%	10%
By Riding Area		
Major Cities	21%	21%
Suburban Areas	39%	14%
Rural Areas	41%	65%
On Weekends	52%	68%

*Percentages are mean averages and therefore do not always add up to 100%.

Source: 1985 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, February 1986.
1988 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Irvine, CA.

ON-HIGHWAY MOTORCYCLE FUEL ECONOMY AND COMMUTING

On average, motorcycles used on-highway are about twice as fuel-efficient as most new automobiles. Motorcycles used on-highway travel from about 40 to 120 miles per gallon of gasoline, depending on the size of the engine.

Of the 3.8 million motorcycles used on-highway, an estimated 2.3 million were used to commute to work or school at some time in 1988. The average number of days commuted in a four week period was 7, and the average number of miles commuted round trip was 23.

1989 MOTORCYCLE FUEL ECONOMY FIGURES

	Estimated Average Miles Per Gallon*	
Engine Displacement	On-Highway Motorcycles	Dual Purpose Motorcycles
Under 125 cc	120	102
125-349 cc	74	90
350-449 cc	57	66
450-749 cc	55	56
Over 749 cc	43	—

* Derived from manufacturer exhaust emission test results. The U.S. EPA requires manufacturers to certify exhaust emissions for all 50 cc and greater on-highway and dual purpose motorcycles. The EPA does not require fuel economy testing for motorcycles. However, fuel economy figures can be derived from the exhaust emission test results. MPG figures were derived in this way from 52, 1989 test vehicles produced by the four leading manufacturers which represent about 89% of the motorcycle sales nationwide.

MOTORCYCLE COMMUTING

Motorcycles Used to Commute to Work or School in 1988 (at some time)	2,300,000
Average Days Commuted in 4 Week Period	7 Days
Average Miles Commuted Round Trip	23 Miles

Source: MPG figures derived from tests performed by manufacturers in accordance with the U.S. EPA motorcycle exhaust emission certification test procedures.
1985 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, February 1986.

MOTORCYCLE RIDER EDUCATION PROGRAMS

It has become apparent in recent years that rider education and training are important steps in motorcycle accident prevention. Motorcycle accident statistics indicate that a substantial percentage of such accidents involve riders with limited experience and training.

Prior to 1973 there were few organized education and training programs to instruct beginners in safe motorcycle operation. Since 1973, the Motorcycle Safety Foundation (MSF), a private nonprofit traffic safety organization, has been successful in developing a motorcycle rider education program which includes instructor preparation and classroom and on-cycle rider instruction and is available to the public, as well as private schools and organizations.

MOTORCYCLE SAFETY FOUNDATION RIDER EDUCATION PROGRAMS

The Motorcycle Safety Foundation's beginning rider education program curriculum, known as the *Motorcycle RiderCourse: Riding and Street Skills* (MRC:RSS) is research-based and field-evaluated, and offers the latest in teaching techniques and instructional guidelines, as well as providing a complete set of educational materials.

The introductory course for new motorcyclists was published in 1976 as the Motorcycle Rider Course (MRC). A revised MRC, the Motorcycle RiderCourse:Riding and Street Skills (MRC:RSS) was introduced in 1986. The MRC:RSS is presently used nationally by state agencies, all branches of the military, and independent sponsors. The Experienced RiderCourse, released in January, 1989, is also available. For the nearest course location, call toll free (800) 447-4700.

Trained Instructors play an important part in the success of a rider education course. MSF Chief Instructors have trained close to 14,500 Instructors since 1973. Instructors complete a course of instruction that includes performance evaluation as a teacher and a motorcycle rider.

Motorcycle manufacturers and dealers cooperate by making motorcycles available for student use in the MRC:RSS training programs. 3,600 motorcycles were loaned to recognized sponsors in 1988.

Through these combined efforts motorcyclists have an opportunity to learn to ride safely. Courses meeting MSF minimum standards have prepared nearly 664,000 students since the program originated in 1973.

Most courses are now supported, in part, with funds generated by state legislation and administered by a state agency. The Foundation's goal is to continue this quality rider education effort for the benefit of the motorcycle riding public.

Instructor Preparation

116 Chief Instructors prepared Instructors with MSF materials in 1988.

14,536 Instructors have been prepared with MSF assistance since 1973.

Rider Education Programs

Almost 664,000 students have completed courses meeting MSF standards since 1973.

772 sites offered quality rider education courses in 1988.

567 were public sites and 205 were military sites.

The MSF rider education programs have been implemented in 50 states.

Source: Motorcycle Safety Foundation, Irvine, California

STATE MOTORCYCLE RIDER EDUCATION PROGRAMS

Many state motorcycle rider education programs are supported, in part, with funds provided by state legislation. In recent years a number of states have recognized the benefits of motorcycle rider education, and have enacted legislation to provide motorcycle safety programs. Thus far, 31 states have passed motorcycle rider education legislation. Funding for these programs is obtained through motorcycle license or registration fees, or from special legislative appropriations.

STATE MOTORCYCLE RIDER EDUCATION PROGRAMS

State	MSF Recognized Rider Education Sites in 1988	MSF Rider Education Course Graduates in 1988	MSF Rider Education Instructors Active in 1988	State Legislation For Rider Education Programs (Effective Date)		Estimated Annual State Funding
Alabama	8	680	32	Yes	(8/8/87)	$190,000
Alaska	5	183	11	No		None
Arizona	17	1,625	73	Yes	(7/24/81)	$ 77,000
Arkansas	4	114	28	No		None
California	78	12,511	405	Yes	(1/1/86)	$ 1.3 mil
Colorado	11	536	55	No		None
Connecticut	11	1,229	57	Yes	(7/1/82)	$127,000
Delaware	6	382	26	Yes	(7/1/85)	$ 82,000
District of Columbia	1	47	6	No		None
Florida	29	3,522	166	Yes	(10/1/87)	$586,000
Georgia	15	832	65	Yes	(1/1/85)	$240,000
Hawaii	8	871	26	Yes	(Amended '87)	$ 23,000
Idaho	3	212	17	No		None
Illinois	40	5,693	251	Yes	(1/1/82)	$950,000
Indiana	12	1,531	112	Yes	(1/1/87)	$210,000
Iowa	42	1,555	134	Yes	(7/1/87)	$260,000
Kansas	12	712	34	Yes	(9/1/82)	$ 98,000
Kentucky	3	887	15	No		None
Louisiana	6	518	13	Yes	(7/6/87)	$ 96,000
Maine	9	1,452	24	Yes	(7/16/86)	$ 76,000
Maryland	18	2,096	124	Yes	(7/1/83)	$580,000
Massachusetts	10	686	48	Yes	(4/7/87)	$133,000
Michigan	34	2,085	158	Yes	(1/1/84)	$650,000
Minnesota	75	1,439	106	Yes	(7/1/82)	$500,000
Mississippi	4	236	16	No		None
Missouri	5	374	46	No		None
Montana	5	117	5	No		None
Nebraska	10	212	41	Yes	(8/15/81)	$ 80,000
Nevada	4	452	18	No		None
New Hampshire	1	57	9	No		None
New Jersey	6	247	32	No		None
New Mexico	5	1,559	55	Yes	(7/1/83)	$ 80,000
New York	11	617	109	No		None
North Carolina	17	516	57	No		None
North Dakota	10	937	53	Yes	(1/1/80)	$161,000
Ohio	23	611	109	Yes	(3/11/87)	$850,000
Oklahoma	7	903	26	No		None
Oregon	7	651	64	Yes	(10/15/83)	$150,000
Pennsylvania	30	7,788	68	Yes	(7/1/84)	$ 1 mil.
Rhode Island	3	2,430	14	Yes	(1/1/79)	$130,000
South Carolina	8	875	33	No		None
South Dakota	22	337	20	Yes	(7/1/82)	$ 51,000
Tennessee	9	230	45	Yes	(7/1/88)	$214,000
Texas	49	3,963	194	Yes	(9/1/83)	$250,000
Utah	3	210	16	No		None
Vermont	1	47	9	No		None
Virginia	25	2,557	181	Yes	(5/1/85)	$210,000
Washington	23	2,380	99	Yes	(6/10/82)	$350,000
West Virginia	0	—	7	No		None
Wisconsin	24	1,022	114	Yes	(5/1/82)	$157,400
Wyoming	3	37	5	No		None
TOTAL U.S. *	772	70,763	3,431			

* Excludes military totals overseas.

Source: Motorcycle Safety Foundation, Irvine, California.

STATE MOTORCYCLE OPERATOR LICENSING PROGRAMS

Each year the Motorcycle Safety Foundation surveys the licensing authorities in the nation's 51 licensing jurisdictions on motorcycle operator licensing programs.

The table below summarizes the use of MSF materials in the state motorcycle operator licensing programs. The Foundation's licensing department provides technical assistance and examiner training for states adopting the MSF approved tests.

1989 STATE MOTORCYCLE OPERATOR LICENSING PROGRAMS

1989 STATE	TYPE OF SKILL TEST	MSF ADOPTION	MSF KNOWLEDGE TEST	WAIVER FOR RIDER EDUCATION	SHARING THE ROAD WITH MOTORCYCLES ADOPTION	NUMBER OF MOTORCYCLE TESTING SITES	NUMBER OF DRIVER LICENSE EXAMINERS	NUMBER OF LICENSED DRIVERS (AS OF 6/30/88)	NUMBER OF LICENSED MOTORCYCLE OPERATORS (AS OF 6/30/88)	TYPE OF VEHICLE REGISTERED AS MOTORCYCLE
Alabama	None	No	No	N	No	N/A	159	2,773,636	9,600	C F G I J
Alaska	MOST/Alternate	Yes	No	N	Yes	32	36	376,873	N/A	D F G I J
Arizona	MOST/Alternate/ MLST	Yes	Yes	N	No	17	159	2,800,000	1,306	C F G I J
Arkansas	Off Street/Alternate	No	No	N	No	40	32	1,662,462	62,839	C E F I J
California	Lollipop	Yes	Yes	N	Yes	162	500	18,025,955	784,226	A C D E F H I J K M
Colorado	Alternate On Street	Yes	Yes	S	Yes	88	154	2,310,349	114,543	C D E F J M
Connecticut	Alternate	Yes	Yes	N	No	11	79	2,926,801	167,857	C D E F H I J M
Delaware	Alternate	Yes	Yes	K S	Yes	4	35	421,348	30,530	F J (over 55cc)
D.C.	MOST/Alternate	No	No	N	Yes	1	10	387,187	8,550	C D E F G
Florida	MOST/Alternate	Yes	Yes	K S	No	81	1,033	10,241,053	379,637	A C D E F J K M
Georgia	MOST/Alternate	Yes	Yes	N	Yes	56	160	4,343,470	184,098	C D E F I J
Hawaii	Alternate/On Street	No	No	N	No	13	55	628,027	19,117	C D E F I J M
Idaho	None	No	No	N/A	No	N/A	44	690,893	N/A	C F G H I J
Illinois	Alternate	Yes	Yes	N	Yes	104	470	7,533,087	565,652	C D E F G H
Indiana	Alternate	Yes	Yes	S	No	39	110	3,590,173	180,467	F L
Iowa	Off Street	Yes	Yes	S	No	143	36	2,000,000	249,154	C D E F I J
Kansas	MOST/Alternate	Yes	Yes	K S	No	105	156	1,678,714	231,098	A B C D E F
Kentucky	Off Street/On Street	No	No	N	No	120	105	2,358,247	77,391	A B C D E F
Louisiana	Off Street	Yes	Yes	S	No	80	284	2,717,543	81,747	C F G
Maine	Alternate MIT	No	No	K	No	28	35	870,716	89,250	C D E F G H J M
Maryland	Alternate	Yes	Yes	N	No	14	112	3,009,476	172,430	F M
Massachusetts	On Street/Off Street	No	No	N	Yes	35	135	4,197,772	245,668	A D F H I J
Michigan	Alternate	No	No	S	No	72	175	7,123,723	484,033	C D E F I J K
Minnesota	Alternate	Yes	No	N	No	101	100	3,035,774	288,424	C D E F G K M
Mississippi	Alternate MIT	Yes	Yes	N	No	80	50	1,800,000	34,520	F G H I J
Missouri	MOST	Yes	Yes	N	Yes	125	151	3,270,720	262,256	F I J
Montana	Alternate	Yes	Yes	N	Yes	59	25	681,379	29,900	A B F
Nebraska	MIT/Alternate	Yes	Yes	S	Yes	95	62	1,300,000	48,838	C D E F H
Nevada	MOST/Alternate/ MLST[1]	Yes	Yes	N	Yes	28	20	800,042	62,888	A C D E F J M
New Hampshire	MOST	No	No	N	No	13	24	783,748	96,772	C D E F J
New Jersey	Off Street/On Street	Yes	Yes	N	No	37	75	5,300,000	243,990	C D E F G J M
New Mexico	MOST/MLST[1]	Yes	Yes	K S	No	50	50	1,034,647	50,000	C D E F G H I J
New York	On Street	Yes	Yes	N	Yes	97	150	10,029,037	452,644	F
North Carolina	Off Street	Yes	Yes	N	Yes	189	367	4,318,723	227,167	C D E F I J
North Dakota	Alternate	Yes	Yes	N	Yes	57	25	434,046	36,496	D E F
Ohio	Off Street	Yes	No	N	No	88	176	7,500,000	571,060	D F
Oklahoma	MIT[2]	No	No	N	No	104	63	2,794,110	N/A	F
Oregon	Alternate	Yes	Yes	N	No	45	203	3,009,310	196,809	C D E F I J
Pennsylvania	Off Street	Yes	Yes	K S	No	77	101	7,691,269	452,754	F J
Rhode Island	Alternate	No	No	K	No	3	15	600,000	40,000	C D E F I
South Carolina	Off Street	No	Yes[3]	N	No	52	125	2,279,486	64,604	A D F H I J
South Dakota	MOST/Alternate	Yes	Yes	K S	Yes	88	45	520,898	N/A	A B C D F G
Tennessee	Alternate/On Street	Yes	Yes	S	Yes	103	198	3,286,051	188,880	F G I J
Texas	On Street	Yes	Yes	N	No	346	336	11,582,925	681,464	F G I J
Utah	MOST/MLST	Yes	Yes	N	No	15	40	1,088,000	125,000	D E F G
Vermont	Alternate	No	No	N	No	10	13	418,546	45,224	E F G J K
Virginia	Alternate/On Street	Yes	Yes	S	Yes	115	184	4,070,041	211,922	C D E F H J
Washington	Alternate	Yes	Yes	N	Yes	57	289	3,187,309	264,525	D F H J
West Virginia	None	No	No	N	No	57	41	1,300,000	88	C D F G H I J
Wisconsin	MIT	Yes	Yes	N	Yes	95	180	3,317,719	299,497	D E F
Wyoming	Alternate	Yes	Yes	N	Yes	35	78	373,014	59,672	B C D F H J

1. In some sites as a pilot or research project
2. Some sites
3. Only 14 and 15 year olds licensed

Parts of Motorcycle Test Waived for Rider Course Graduates

P — Partial
N — None
K — Knowledge
S — Skill

MOST - Motorcycle Operator Skill Test
Alternate - Alternate MOST
MIT - Motorcyclist In-Traffic Test
Alternate MIT
MLST - Motorcyclist Licensing Skill Test

Vehicles Registered as Motorcycles

A — 3-wheel all-terrain vehicle
B — All-terrain with more than 3 wheels
C — 3-wheel service vehicle (cushman type)
D — Modified 3-wheel (straddle seat)
E — Modified 3-wheel (bench seat)
F — Motorcycle with side car
G — Mopeds
H — No pedals (small displacement 2-wheel vehicle without pedals)
I — Mini-bikes
J — Motorbikes
K — Golf Carts
L — Snowmobiles
M — 3-wheels with rear axle tread width under 25"

The Motorcycle Operator Manual (MOM)

The *Motorcycle Operator Manual (MOM)* includes information on proper protective gear, handling different road surfaces and reacting to emergencies. License applicants in a study group increased their knowledge 15 percent by reading the manual. MSF provides free printer's negatives on a loan basis to states adopting the manual.

The Motorcycle Knowledge Test

The Motorcycle Knowledge Test was developed from the contents of the *Motorcycle Operator Manual*. Using multiple choice questions and line drawings, the test emphasizes areas critical to safe riding. MSF will provide a set of tests and slides for duplication to states using automated testing machines.

The Motorcycle Skill Test Practice Guide

The Practice Guide is designed to provide motorcycle license applicants with a series of exercises that they can practice in a parking lot before they take their skills test. These exercises are not meant to replace a rider education course but simply to provide practice on necessary skills before testing. MSF provides free printer's negatives on a loan basis for states that would like to provide this booklet to motorcycle applicants.

The Sharing The Road With Motorcycles Information

Studies have shown that most motorcycle accidents are caused by drivers of other vehicles. MSF has developed information for state driver's manuals titled *Sharing The Road With Motorcycles*. It gives other drivers information on conditions and situations commonly faced by motorcyclists.

The Motorcycle Operator Skill Test (MOST)

The MOST was the first off-street test developed in the early 1970's and still is being used by some states today. This test contains nine exercises and employs the use of sophisticated timing equipment. The Alternate MOST and MLST were designed as less expensive alternatives to be conducted in more constricted areas.

The Alternate Motorcycle Operator Skill Test (Alternate MOST)

The Alternate MOST was developed specifically for those areas with limited space available and employs the use of manual timing equipment. It includes seven exercises that test basic skills in an off-street setting.

The Motorcyclist Licensing Skill Test (MLST)

The MLST is the most recently developed off-street test drawing on lessons learned from tests that had come before it. This test combines administrative practicality with test reliability and rider safety. Applicants are required to complete a series of three exercises in such a manner as to allow examiners to evaluate riding performance objectively.

The Motorcyclist In-Traffic Test (MIT)

Several states do not have off-street testing facilities or prefer to administer an in-traffic test. The MIT consists of 21 test situations considered to be most important for the safe operation of a motorcycle in traffic. The applicant is scored by an examiner following the motorcycle in another vehicle.

This information was assembled by the Motorcycle Safety Foundation licensing department. Licensing authorities in all 50 states and the District of Columbia were directly contacted by MSF for an update on the information listed in this chart. Although this information was obtained from the most authoritative sources available as of December 1988, the Motorcycle Safety Foundation is not responsible for its accuracy or completeness.

Source: Cycle Safety Info, State Motorcycle Operator Licensing — 1989, Motorcycle Safety Foundation, Irvine, California.

STATE MOTORCYCLE OPERATOR LICENSING PROCEDURES

Program efforts and improvements in licensing as well as education are needed to help reduce motorcycle accidents, deaths and injuries. The Motorcycle Safety Foundation has aided in this effort through the development of improved motorcycle operator licensing examinations and the training of state licensing personnel.

Current licensing requirements and procedures by state, for 1989, are outlined below. Nearly all states require a special motorcycle license or endorsement for all individuals regardless of age, have a special knowledge test for motorcycle operators, and inspect the motorcycle or check for a valid inspection sticker. The minimum age for obtaining a motorcycle license ranges from 14 to 16.

1989 STATE MOTORCYCLE OPERATOR LICENSING PROCEDURES

1989 STATE	SPECIAL LICENSE OR ENDORSEMENT	DURATION OF LICENSE	MINIMUM AGE WITH DRIVER EDUCATION	LEARNER'S PERMIT	MINIMUM AGE WITHOUT DRIVER EDUCATION	RIDER EDUCATION PREREQUISITE TO LICENSING	SKILL TEST ADMINISTRATION (APPT) OR APPOINTMENT (APPT) ON WALK-IN (WI) BASIS	PE EXAMINATION REQUIRED	VISION	Reexamined for: KNOWLEDGE	Reexamined for: DRIVE SKILLS	Reexamined for: IN TRAFFIC
Alabama	Yes[4]	1	16	No	14 16[5]	No	No	N/A	N/A	N/A	N/A	N/A
Alaska	B[1]	5	16[1]	2 yrs	14[1]	No	APPT W	Yes[1,4]	Yes	No	No	No
Arizona	B C	4	16	No	16	No	WI	Yes[4]	Yes	Yes[4]	Yes[11]	No
Arkansas	MC[1,4] C	2/4	16[6]	No	16[6]	No	WI	Yes[4]	No	No	No	No
California	Class 4	1	16	1 yr	18	Yes	APPT	Yes	Yes	Yes	No	No
Colorado	M	4	16	180 days	16	No	APPT WI	Yes[1,4]	Yes	Yes	No	No
Connecticut	107.105 104.105	4	16	60 days	16	No	APPT	No	No	No	No	No
Delaware	MC	4/5	16	60 days	18	Yes	WI	Yes	Yes	No	No	No
D.C.	7.6	4	16	60 days	16	No	APPT	Yes[1,4]	Yes	Yes	Yes	Yes
Florida	W T	4/6	15	90 days	15	No	APPT	70 + Yes[1]	70 + Yes	70 + Yes	No	No
Georgia	Class 2	4	16	6 mo	16	No	WI	Yes[1,4]	Yes	No	No	No
Hawaii	Type 2	2/4	15	90 days	15	No	APPT WI	Yes[1,4]	Yes	Yes	No	No
Idaho	None	N/A	14	No	16	No	APPT	No	Yes	No	No	No
Illinois	L M	4	16[1]	1 yr	18	Yes[1]	WI	Yes	Yes	Yes	Yes[11]	Yes[11]
Indiana	MC	3/4	16	1 Yr	16[1]	No	WI	Yes[1,4]	Yes	Yes[1]	No	No
Iowa	B	2/4	16[1]	2 yrs	18	Yes[1]	APPT	Yes[1,4]	Yes	No	No	No
Kansas	D	4	14	6 mo	14	No	WI	Yes[4]	Yes	Yes	No	No
Kentucky	Yes[4]	4	16	6 mo	16	No	APPT WI	N/A	N/A	N/A	N/A	N/A
Louisiana	7	4/5	15	No	15	No	WI	No	Yes	No	No	No
Maine	I D	4	16	1 yr	21	Yes[1]	APPT	Yes	Yes[1]	No	No	No
Maryland	E	4	16	180 days	18	No	WI	Yes[1,4]	Yes	No	No	No
Massachusetts	M	4	16½	1 yr	16	No	APPT	Yes[1,4]	Yes	No	No	No
Michigan	Cy	4	16	150 days	18	Yes[1]	APPT	No	Yes	Yes	No	No
Minnesota	C 1	4	16	45 days	18	Yes[1]	APPT WI	Yes[1,4]	Yes	No	No	No
Mississippi	8 or E	4	15	60 days	15	No	WI	Yes[1,4]	No	No	No	No
Missouri	M W	3	16	60 days	16	No	WI	Yes[4]	Yes	No	No	No
Montana	M	4	15	6 mo	16	No	APPT WI	Yes[1,4]	Yes	No	No	No
Nebraska	B	4	16	1 yr	16	No	APPT	Yes	Yes	Yes	No	No
Nevada	Class 4[18]	4	16	6 mo	16	No	APPT WI	Yes[1,4]	Yes	No	No	No
New Hampshire	MC	4	16	30 days	18	No	APPT WI	Yes[1,4]	Yes	No	No	No
New Jersey	A E F	4	17	90 days	17	No	APPT	Yes[1,4]	Yes	No	No	No
New Mexico	4 or 3	4	15	6 mo	16	Yes[11]	APPT WI	Yes[1,4]	Yes	No	No	No
New York	Class 7 8	4	16	1 yr	16	No	APPT	Yes[1,4]	Yes	No	No	No
North Carolina	A B C	4	16	N/A	18	No	APPT WI	Yes[1]	Yes	No	No	No
North Dakota	4	1	14	6 mo	16	Yes[12]	APPT	Yes[1,4]	Yes	Yes	Yes	No
Ohio	5	4	16	6 mo	18	No	APPT	Yes[1,4]	Yes	No	No	No
Oklahoma	No	4	14	90 days	14[13]	No	WI	No[1,4]	No	No	No	No
Oregon	M1 M2	4	16	1 yr	16	No	APPT	N/A	N/A	N/A	N/A	N/A
Pennsylvania	Yes	2/4		120 days	16	No	APPT WI	No	No	No	No	No
Rhode Island	H	1	16	30 days	N/A	Yes	APPT	N/A	N/A	N/A	N/A	N/A
South Carolina	Class 4	4	16	6 mo	16	No	APPT WI	Yes[1,4]	Yes	No	No	No
South Dakota	Yes	4		No	14	No	WI	Yes[4]	No	No	No	No
Tennessee	M(7/1/89) Mtrcycle	4	16	90 days	16	No	WI	Yes[1]	No	No	No	No
Texas	M	4	16	2 yrs	18	Yes[1]	WI	Yes[1,4]	Yes	No	No	No
Utah	M	4	16	6 months	N/A	No	WI	Yes[1,14]	Yes	Yes	No	No
Vermont	1 M A B	2/4	16	60 days	18	No	APPT	Yes[1,4]	Yes	No	No	No
Virginia	C	5	16	1 yr	N/A	No	WI	Yes	Yes	No	No	No
Washington	1,2 or 3	4	16	90 days	18	Yes[1]	APPT	Yes[1,4]	Yes	No	No	No
West Virginia		N/A	16	60 days	16	No	WI	No	No	No	No	No
Wisconsin	Yes[1,9]	1	16	6 mo	18	No	APPT	Yes[1,4]	Yes	No	No	No
Wyoming	M M TM	4	16	1 yr	16	No	WI	Yes[1,4]	Yes	No	No	No

1 Under age 18.
2 If driving record warrants.
3 At examiner's discretion.
4 Motorcycle Only applicants.
5 Age 69 and older required to pass complete exam every 4 years.
6 In traffic test required for 75 years of age or older.
7 Age 14, if only used back and forth to school.
8 Under 16 restricted to 250cc or less.
9 Only when expired or revoked.
10 Age 16-17 year olds.
11 16 year olds must have basic driver education and motorcycle driver education.
12 Between 16 and 21 must complete a driver education course.
13 Ages 14 and 15.
14 If physical condition or medical problem requires it.
15 After age 60.
16 Include Cycle (S)peration written on license.
17 If available in that area.
18 Restrictions. U if applicant taken skill test in 4 wheel motorcycle. X if skill test is taken on 3 wheel motorcycle.

This information was assembled by the Motorcycle Safety Foundation licensing department. Licensing authorities in all 50 states and the District of Columbia were directly contacted by MSF for an update on the information listed in this chart.

Although this information was obtained from the most authoritative sources available as of December 1988, the Motorcycle Safety Foundation is not responsible for its accuracy or completeness.

Source: Cycle Safety Info, State Motorcycle Operator Licensing — 1989, Motorcycle Safety Foundation, Irvine, California.

MOTORCYCLE ACCIDENT STATISTICS BY STATE

The Motorcycle Safety Foundation has compiled the following motorcycle accident statistics for 1988 from state sources.

In 1988 the number of reported motorcycle accidents decreased 11.4% and fatalities decreased 9.7% compared to 1987. The number of accidents per 10,000 registrations declined 5.4%, and fatalities per 10,000 registrations declined 3.5%.

1988 MOTORCYCLE ACCIDENT STATISTICS

	Registrations	Reported Accidents	Accidents Per 10,000 Registrations	Fatalities	Fatalities Per 10,000 Registrations	Fatalities Per 100 Accidents
National						
1988	4,426,123	126,972	286.87	3,567	8.06	2.81
1987	4,729,890	143,369	303.11	3,951	8.35	2.76
State Data - 1988						
Alabama	(1,3,7,9-11,15,20-22,26,27)	52,715	1,647	312.43	39	7.40	2.37
Alaska	(1,7-11,16,20-22,26,27)	12,461	158	126.80	4	3.21	2.53
Arizona	(1,3,4,7,8,10,11,16,20-22,26,27)	76,091	3,227	424.10	89	11.70	2.76
Arkansas	(1,7-11,15,20-22,26-28)	35,586	1,097*	661.40	31	18.69	2.83
California	(1,7-9,14,20-22,24,26,27)	664,819	23,830	358.44	603	9.07	2.53
Colorado	(1,7,8,11,14,20-22,26,27)	115,629	2,092	180.92	50	4.32	2.39
Connecticut	(1,7,8,11,17,20-22,26,27)	59,331	1,822	307.09	61	10.28	3.35
Delaware	(1,7,8,15,20-24,26,27)	7,766	321	413.23	11	14.16	3.43
Dist. of Col.	(1,3,7,8,10,15,20-23,26,27)	1,911	350*	1,831.50	5	26.16	1.43
Florida	(1,7,8,18,20-24,26,27)	203,913*	7,742	379.67	217	10.64	2.80
Georgia	(1-4,7,8,11,15,20-22,26,27)	75,341	2,321	308.07	57	7.57	2.46
Hawaii	(1,7,8,11,15,20-22,26,27)	11,544	500*	433.13	18	15.59	3.60
Idaho	(1,7,8,11,15,20-22,26,27)	38,282	597	155.95	29	7.58	4.86
Illinois	(1,3,7-11,15,20-22,26,27)	243,789	7,148*	293.20	173*	7.10	2.42
Indiana	(1,7-11,14,20-22,26-28)	99,745	3,683	369.24	90	9.02	2.44
Iowa	(1,7,16,20-22,26,27)	145,967	1,800*	123.32	58	3.97	3.22
Kansas	(1,7,16,20-22,26,27)	64,724	1,274	196.84	40	6.18	3.14
Kentucky	(1-3,5,7-11,14,20-22,26,27)	32,054	1,295	404.01	43	13.41	3.32
Louisiana	(1,7,8,10,11,14,21,22,26,27)	68,080*	1,163	170.83	49	7.20	4.21
Maine	(1,7-10,15,20-22,24,26-28)	35,876	753	209.89	20	5.57	2.66
Maryland	(1,7,8,11,19-22,26,27)	51,358	2,010	391.37	59	11.49	2.94
Massachusetts	(1,7,17,20-22,26,27)	59,000*	2,000*	338.96	56	9.49	2.80
Michigan	(1,2,4,7,14,20-22,26,27)	150,000*	4,211	280.73	76	5.07	1.80
Minnesota	(1,7,8,11,16,20-22,24,26,27)	128,956	1,969	152.69	58	4.50	2.95
Mississippi	(1,3,7,9,15,20-22,26,27)	18,411	680*	369.34	18*	9.78	2.65
Missouri	(1,7,8,10,16,20-24,26,27)	81,123	2,047	252.33	65	8.01	3.18
Montana	(1,4,7,8,16,20-22,24,26,27)	24,294	419	172.47	18	7.41	4.30
Nebraska	(1,7,16,20-22,26,27)	29,068	857	294.62	19	6.53	2.22
Nevada	(1,7,19-22,26,27)	17,649	818	463.48	26	14.73	3.18
New Hampshire	(1,7,16,20-22,26-28)	30,410	931	306.15	19	6.25	2.04
New Jersey	(1,7,8,11,15,20-22,26-28)	77,734	3,200*	411.66	52	6.69	1.63
New Mexico	(1,7-11,15,20-22,26,27)	35,421	1,385	391.01	40	11.29	2.89
New York	(1,7,17,20-22,26,27)	201,265	5,642	280.33	160	7.95	2.84
North Carolina	(1,7,16,20-22,26,27)	59,991	2,114	352.39	75	12.50	3.55
North Dakota	(1,3,7,17,20-22,26,27)	23,978	234	97.59	8	3.34	3.42
Ohio	(1,7,8,11,19-22,26,27)	243,885	5,715	234.33	153	6.27	2.68
Oklahoma	(1,7,15,20-22,26,27)	64,056	1,493	233.08	48	7.49	3.22
Oregon	(1,7-10,16,20-23,26,27)	71,538	1,200*	167.74	49	6.85	4.08
Pennsylvania	(1,7-9,11,19-22,26,27)	174,790	3,961	226.61	132	7.55	3.33
Rhode Island	(1,3,7,15,20-22,26,27)	32,626	350*	107.28	14	4.29	4.00
South Carolina	(1,7,14,20-22,26,27)	33,426	1,580	472.69	61	18.25	3.86
South Dakota	(1,3,4,7-11,17,20-22,24,26,27)	31,421	424	134.94	13	4.14	3.07
Tennessee	(1,7,8,11,14,20-22,26,27)	114,071*	2,450*	214.78	66	5.79	2.69
Texas	(1,3,7,15,20-22,26,27)	206,497	8,108	392.64	295	14.29	3.64
Utah	(1,7,8,10,16,20-24,26,27)	28,900	1,042	360.55	27	9.34	2.59
Vermont	(1,7,16,20-22,26,27)	17,438	222	127.31	3	1.72	1.35
Virginia	(1,7,19-22,26,27)	66,327	1,944	293.09	65	9.80	3.34
Washington	(1,7,15,20-22,26,27)	112,228	2,813	250.66	76	6.77	2.70
West Virginia	(1,7,8,10,11,15,20-22,26,27)	26,511	630	237.64	22	8.30	3.49
Wisconsin	(1,3,7,16,20-24,26,27)	167,055	3,407	203.94	93	5.57	2.73
Wyoming	(1,7-11,16,20-22,26-28)	20,050	296	147.63	14	6.98	4.73

* Estimated

Footnotes

Registrations: (vehicle types included)
1. Street-legal motorcycles (on-highway and dual purpose)
2. Off-highway motorcycles
3. Mopeds or motorized bicycles (50 cc or less)
4. 3 or 4-wheeled all-terrain vehicles (sometimes known as ATVs or ATCs)
5. Other types of vehicles
6. No description available

Accidents: (vehicle types included)
7. Street-legal motorcycles (on-highway and dual purpose)
8. Off-highway motorcycles
9. Mopeds and motorized bicycles (50 cc or less)
10. 3 or 4-wheeled all-terrain vehicles (sometimes known as ATVs or ATCs)
11. Vehicle types 8, 9 or 10 included only if accident or fatality occurs on public roads
12. Other types of vehicles
13. No description available

Criteria for Reporting Accidents:
14. $0-$199 property damage threshold
15. $200-$399 property damage threshold
16. $400-$599 property damage threshold
17. $600-$1,000 property damage threshold
18. When vehicle is towed
19. No description available

Accidents include:
20. Motorcycle-related accident where property damage occurs (see reporting criteria above.)
21. Motorcycle-related accident where personal injury or fatality occurs
22. Motorcycle-related accidents occurring on public streets/highways
23. Motorcycle-related accidents occurring on nonpublic property
24. Motorcycle-related accidents occurring on public off-highway lands
25. No description available

Fatalities include:
26. Motorcycle operators fatally injured in a motorcycle accident
27. Motorcycle passengers fatally injured in a motorcycle accident
28. Others fatally injured in a motorcycle accident, such as pedestrians, car occupants, bicyclists, etc.
29. No description available

Source: Compiled by Motorcycle Safety Foundation, Irvine, CA., as of July 17, 1989.

STATE MOTORCYCLE EQUIPMENT REQUIREMENTS

Each state governs the operation, registration, and licensing of motor vehicles. In general, motorcycles registered for use on public highways are required to meet the equipment requirements in the state in which they are registered. This is in addition to compliance with Federal Motor Vehicle Safety Standards which is required by the motorcycle manufacturers.

The most current state equipment requirements, as of June 1989, are listed below.

STATE MOTORCYCLE EQUIPMENT REQUIREMENTS, JUNE, 1989

	SAFETY HELMET	EYE PROTECTION	REARVIEW MIRROR	BRAKES	HANDLEBAR HEIGHT	PASSENGER SEAT	PASSENGER FOOTRESTS	PASSENGER HANDHOLD	HEADPHONES PROHIBITED	TURN SIGNALS	SPEEDOMETER/ ODOMETER	HEADLIGHT DAYTIME USE	PERIODIC INSPECTION
Alabama	•		•	•-13	•-17	•	•						
Alaska	•-5	•-k	•-11	•-13	•-17	•	•	•	•				•-25
Arizona	•-4	•-j	•	•-12	•-17	•	•	•					•-23
Arkansas	•	•	•	•-12		•	•	•				•	•
California	•-9		•	•-13	•-19	•	•		•-n	•-b		•-i	•-25
Colorado		•	•	•-12		•	•		•-o				•-25
Connecticut	•-4,r	•-j	•	•-13,g	•-17	•	•					•-e	•-25
Delaware	•-1,7	•	•	•-12	•-17	•	•			•			•
Dist. of Col.	•	•-j	•	•-13	•-17,#	•	•	•			•-20		•
Florida	•	•	•	•-13	•-17	•	•		•-o			•	
Georgia	•	•-j	•	•-12	•-17	•	•		•-q			•	
Hawaii	•-1,4	•-j	•	•-12	•-17	•	•						•
Idaho	•-4		•	•-12		•	•						
Illinois		•	•	•-12	•-19	•	•		•-o			•	
Indiana	•-4	•-4		•-13	•-17	•	•					•	
Iowa			•	•-12	•-17	•	•				•	•-h	
Kansas	•-4	•-j	•	•	•-19	•	•			•-b		•-21	•-25
Kentucky	•	•	•	•-12		•	•						
Louisiana	•	•-j	•-10	•-12	•-17	•	•						•
Maine	•-3		•	•-12	•-19	•	•					•	•
Maryland	•-1,4	•-j	•-11	•-12	•-17	•	•	•-#	•-n		•-#		•-24
Massachusetts	•	•-j	•	•-13	•-17	•	•		•				•
Michigan	•	•-2,j	•	•-13	•-17	•							•-25
Minnesota	•-4,m	•-j	•	•-12	•-19	•	•		•-n			•	•-25
Mississippi	•		•	•-12	•-14,#						•-20,#		•
Missouri	•			•-12	•-17,#								•
Montana	•-4		•	•-13		•	•					•	
Nebraska	•			•-12	•-16	•	•						
Nevada	•	•-j	•-11	•-13	•-17	•	•			•			
New Hampshire	•-4	•-j	•	•-12	•-17	•	•	•-#		•	•-#		•
New Jersey	•-1	•-j	•	•-12	•-19	•	•						•
New Mexico	•-1,4	•-j	•	•-13	•-17	•	•						•-25
New York	•-1	•	•	•-13	•-17	•			•-n	•-a,#	•-20,l	•	•
No. Carolina	•		•	•-12		•	•					•	•
No. Dakota	•-1,4		•	•-13	•-17	•	•				•		
Ohio	•-4,8	•-j	•	•-12	•-17	•	•						•-25
Oklahoma	•-4	•-j	•-11	•-13	•-15	•	•				•-20		•
Oregon	•		•	•-12	•-19	•	•			•-b		•	•-25
Pennsylvania	•	•	•-d,#	•-13	•-19	•	•	•			•-#		•
Rhode Island	•-p	•	•	•-12	•-17	•	•	•	•		•-20,a		•
So. Carolina	•-1,6	•-6,j	•	•-13	•-17	•	•					•	•
So. Dakota	•-4	•-j	•	•-12	•-17	•	•						
Tennessee	•	•-j	•	•-12	•-17	•	•					•	
Texas	•-26		•	•-13	•-17,#	•							•
Utah	•-4		•	•-12	•-19	•	•	•-#			•-22		•
Vermont	•-1	•-j	•	•	•-17	•	•						•
Virginia	•	•-j	•	•-13,c	•-17	•	•		•				•
Washington	•-4	•-j	•-11	•-13,a	•-17	•	•		•			•	•-25
W. Virginia	•-1	•	•	•-12	•-17	•	•					•	•
Wisconsin	•-4,m	•-k	•	•-12	•-18	•	•				•	•	•-25
Wyoming	•-4		•	•-12	•-19	•	•					•	

• Requirement in law
• If carrying a passenger

1 Reflectorization
2 Where speeds exceed 35 mph
3 Under 15 ½ years, with learner's permit or for 1 year after obtaining license
4 Under 18 years
5 Under 19 years
6 Under 21 years
7 Possession by all, wear under 19 years & by instruction permit holders
8 Novice license holders
9 Under 15½ years
10 Left side
11 Left and right side
12 One wheel
13 Both wheels
14 Maximum of 10" above fasten point
15 Maximum of 12" above fasten point
16 Maximum of 15" above fasten point
17 Maximum of 15" above seat
18 Maximum of 30" above seat
19 Handgrips below shoulder height
20 Speedometer
21 For motorcycle manufactured after 1/1/78
22 Odometer
23 Annual emissions inspection
24 Upon transfer of title
25 Random
26 Effective 9/1/89
a If originally equipped by manufacturer
b For motorcycle manufactured after 1/1/73
c For motorcycle manufactured after 7/1/74
d For motorcycle manufactured after 4/1/77
e For motorcycle manufactured after 1/1/80
f For motorcycle manufactured after 9/1/80
g For 1974 or later model year motorcycle
h For 1977 or later model year motorcycle
i Manufacturer requirement for motorcycle manufactured after 1/1/78
j Except if equipped with windscreen
k Except if equipped with windscreen 15" or higher
m Instructional permit holders
n Prohibited in both ears simultaneously
o Except helmets with speakers
p For passengers only
q Prohibited except for communication
r Effective 1/1/90

Required by inspection regulations

Many state inspection regulations require that any equipment installed on a motorcycle must function properly even though the equipment is not required by law.

Although this chart represents information from the most authoritative sources available as of the date shown above, the Motorcycle Industry Council is not responsible for accuracy or completeness.

Information concerning equipment requirements in Canada can be obtained from the Motorcycle & Moped Industry Council (MMIC) at 7191 Woodbine Ave., Suite 229A, Markham, Ontario, Canada L3R 1A3; (416) 470-6123

Source: Motorcycle Industry Council, Irvine, California

STATE OFF-HIGHWAY MOTORCYCLE REQUIREMENTS

Off-highway motorcycles and all-terrain vehicles are subject to a wide variety of regulations for use in nearly every state. Individual states may have a vehicle registration program, an operator license requirement or specific equipment requirements. Several states are also developing a special off-highway fund through the registration program or gasoline tax rebates based on the amount of fuel used off-highway. This money is then used for the acquisition, development or maintenance of off-highway vehicle use facilities.

The chart below summarizes the requirements of each state for vehicles and operators as of May, 1989. The requirements specified below do not necessarily apply to ATVs. For information on ATV requirements contact the Specialty Vehicle Institute of America at the address on page 44.

STATE OFF-HIGHWAY MOTORCYCLE REQUIREMENTS, MAY, 1989

	OFF-HIGHWAY REGISTRATION	VEHICLE TITLE	OPERATOR LICENSE	MINIMUM AGE TO OPERATE	LIGHTING	BRAKES	MUFFLER	SPARK ARRESTER	OTHER	RIDER EDUCATION	STATE OHV FUNDING	OHV ADVISORY COUNCIL	TOTAL MOTORCYCLES USED OFF-HIGHWAY AT SOME TIME IN 1988
State													
Alabama													103,900
Alaska				14BH									32,500
Arizona		•					•-f			X	•-m	Yes	70,900
Arkansas												Yes	103,200
California	•-Ad	•			•-K	•	•-Mf	•-N		X	•-T	Yes	446,700
Colorado	•-neo				•-Kjo	•-fo	•-Mf	•-fo			•-So		56,300
Connecticut	•-Ed				•	•	•						33,400
Delaware	•-Dd			12B	•-K	•	•-Mf	•	•-O	X	•-S		7,900
Dist. of Col.		•											100
Florida	•-EeH												143,900
Georgia						•	•						130,900
Hawaii													N/A
Idaho	•-e						•-M			X	•-T	Yes	43,000
Illinois	•-e			10,12B,16B or a	•-K	•	•	•-N	>-Pj	•-G	•-T	Yes	98,600
Indiana	•-jDe	•-l		14B		•-L	•				•-S		90,300
Iowa													47,700
Kansas													35,900
Kentucky							•						61,400
Louisiana	•-d	•											98,800
Maine	•-Fe				•-Kf		•-Mf	•	•-W	•-C	•-S		31,300
Maryland	•-eH		•-BH	12H	•-KH	•-H	•-MH				•-S		42,700
Massachusetts	•-Ee			12, 14B, 10g	•	•	•-M	•	•-O				53,300
Michigan	•-Fd			12B, 16B or a	•-K	•-L	•-Mf	•		•-J	•-S		179,200
Minnesota		•-l											89,300
Mississippi		•-l											65,500
Missouri		•											97,400
Montana	•-d	•-jk									•-sk		30,200
Nebraska													34,400
Nevada		•-l						•					24,000
New Hampshire	•-De		•-a	12, 16B or a	•-K	•-L	•-M	•	•-Y	•-J	•-U	Yes	29,800
New Jersey													68,100
New Mexico	•-Ed	•											30,100
New York	•-Fd			16B, 10h	•-Kf	•-L	•-Mf	•-N	•-O	•-c	•-S		155,500
No. Carolina													108,200
No. Dakota							•-MH						17,200
Ohio	•-Ed		•-j	16B, 12i	•	•	•				•-S		144,200
Oklahoma					•-KH		•-H	•-H	•-OH			Yes	64,900
Oregon					•-K	•	•-M	•-H					74,600
Pennsylvania							•-H	•-NH					170,600
Rhode Island	•-Ee	•		12, 16BH	•-K	•	•-Mf		•-Q				7,400
So. Carolina		•-l											39,200
So. Dakota		•					•						16,900
Tennessee		•					•-H	•-H	•-PH				117,400
Texas		•					•-H	•-NH	•-OH				244,700
Utah	•-jEd	•-Z	•-a	8j, 16a	•-K	•	•		•-R	•-b	•-T	Yes	67,000
Vermont	•-jEd			12b	•-f	•-f	•-Mf						13,300
Virginia													79,800
Washington	•-Dd				•-K	•	•-M	•		X	•-T	Yes	88,700
W. Virginia													61,100
Wisconsin											•-V	Yes	81,200
Wyoming													18,400
U.S. TOTAL													3,951,000

• Requirement in Law

A Except street-registered OHMs. Identification sticker required to transport competition OHM.
B Unless supervised.
C Under age 18.
D Except street-registered OHMs or OHMs in races.
E Except street-registered OHMs.
F Except OHMs in races.
G For ages 10-11 & ages 12-15 unless supervised.
H Applies only on certain state lands.
I Only if ban exists.
J Ages 12-15 unless supervised.
K Night operation only.
L Specific performance requirements.
M Decibel sound limit specified.
N Approved by U.S. Forest Service.
O Approved helmet.
P Helmet and eye protection.
Q 16 sq. in. reflective material each side of OHM and approved helmet.
R Approved helmet in competitive events or if under 18.
S Registration and other fees.
T Fees and gasoline tax allocation.
U Registration and other fees. Gas tax refund for off-highway use.
V Special appropriations.
W Approved helmet if under 18.
X Safety education & info program available.
Y Helmet and eye protection if under 18.
Z For 1988 model year or newer.
a Unless in possession of safety certificate.
b Unless operator's license possessed.
c Ages 10-15 unless supervised.
d By Motor Vehicle Registration Agency.
e By Recreation Management Agency.
f Except in authorized competitive events.
g In authorized events.
h With safety certificate.
i On DNR lands if accompanied by parent.
j On public lands.
k Effective 1/1/90.
l Legislative appropriation & OHV gas tax allocation.
m Except OHMs used only for agriculture or in authorized events.
n Effective 4/1/90.

OHM SOUND LEVEL LIMITS

	TEST PROCEDURES
CA Manufactured before 1973 92 dBA; 73-74 86 dBA; 75-85 86 dBA, after 85 82 dBA; or 101 dBA.	a,d
CO Manufactured 1971-72 86 dBA; 73 and after 84 dBA; different local limits also permitted.	a
DE Manufactured 1978 and after 88 dBA or EPA limit.	b
ID 92 dBA.	c
MD Manufactured after 5/75 86 dBA; 76 and after 84 dBA.	a
MA 103 dBA.	d
ME Must meet Federal EPA Standards.	
MI Manufactured before 1973 90 dBA; 73-74 86 dBA; 75 and after 86 dBA or EPA limits.	a
NH Manufactured 1973-74 88 dBA; 75 and after 86 dBA	
NY Must meet Federal EPA Standards.	
ND 85 dBA.	a
OR In use, Model year 1975 and before 102 dBA; 75 and after 99 dBA. Certification 1977-82 models 81 dBA; 83-87 78 dBA; 87 and after 75 dBA. Racing; 105 dBA.	d,a,d

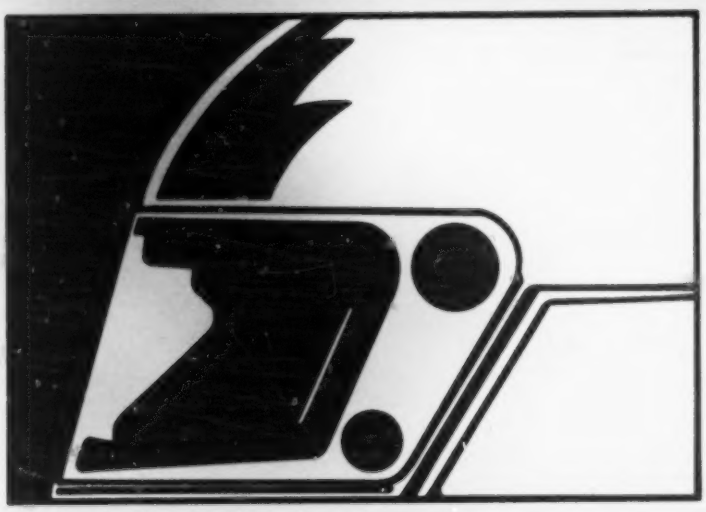
	TEST PROCEDURES
RI Manufactured after 5/72 82 dBA; after 5/74 73 dBA.	a
UT 92 dBA.	b
VT 82 dBA.	e
WA 86 dBA or 105 dBA.	a,d

TEST PROCEDURE

a Acceleration test 50 feet incorporating SAE J331a or similar test method
b Passby test 50 feet
c Passby test 20 feet
d Stationary test 20 inches
e Measured at 50 feet. Test procedure not prescribed.

Although the chart represents information from the most authoritative sources available as of the date shown above, the Motorcycle Industry Council is not responsible for accuracy or completeness.

Source: Motorcycle Industry Council, Inc., Irvine, California



The Motorcycle Owner

MIC

NUMBER OF OWNERS AND RIDERS, OWNER'S SEX, MARITAL STATUS, AGE, EDUCATION

It is estimated that the 7.1 million motorcycles, scooters and ATVs in use were owned by 5.5 million owners in 1988. Based on 1985 consumer research, these vehicles were operated by 8.9 million riders in households owning these vehicles and another 30 million riders in households not owning these vehicles in 1985.

1985 consumer research indicates that 91% of the owners were male and 9% were female, and one half were married. The average owner age was 28 in 1985 compared to 24 in 1980.

High school was the highest level of education attended by about half (53%) of the owners, and almost two fifths (37%) had achieved some college or post graduate education in 1985.

MOTORCYCLE OWNER PROFILE: NUMBER OF OWNERS AND RIDERS, SEX, MARITAL STATUS, AGE, EDUCATION

5,480,000 Estimated Motorcycle, Scooter, and ATV Owners in 1988

8,850,000 Estimated Riders in 1985 in Households Owning These Vehicles*

30,000,000 Estimated Riders in 1985 in Households Not Owning These Vehicles*

*Estimates not available since 1985.

Sex	% of Total Owners '85	% of Total Owners '80
Male	91.3%	92.1%
Female	8.7%	7.9%

Marital Status	% of Total Owners '85	% of Total Owners '80
Single	47.7%	51.7%
Married	50.2%	44.3%
Not Stated	2.1%	4.0%

Age	% of Total Owners '85	% of Total Owners '80
Under 18	16.6%	24.6%
18-24	20.2%	24.3%
25-29	18.6%	14.2%
30-34	13.6%	10.2%
35-39	8.7%	8.8%
40-49	12.5%	9.4%
50 and Over	7.9%	5.7%
Not Stated	1.9%	2.8%
Median Age	27.7 yrs.	24.0 yrs.
Mean Age	29.7 yrs.	26.9 yrs.

Highest Level of Education	% of Total Owners '85	% of Total Owners '80
Grade School	8.6%	13.5%
Some High School	16.0%	18.9%
High School Graduate	36.5%	34.6%
Some College	20.4%	17.6%
College Graduate	12.0%	9.2%
Post Graduate	4.8%	3.1%
Not Stated	1.7%	3.1%

Note: The owner is defined as the primary rider, and the rider is the operator, not the passenger of the vehicle.

Source: 1980 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, April 1981.
1985 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, February 1986.

OWNER OCCUPATION, INCOME, RIDING EXPERIENCE AND MOTORCYCLE OWNERSHIP

Of the owners employed in 1985, 22% were laborers or semi-skilled laborers, another 18% held professional or technical positions, and another 15% were mechanics or craftsmen.

In 1985 about 29% of all owners were students, compared with 27% in 1980.

Of the owners indicating their household income for the prior year, the average income for 1984 was $25,900 compared to $17,500 for 1979.

The average motorcycle owner has been regularly riding for eight years and has owned three motorcycles.

OWNER PROFILE: OCCUPATION, INCOME, RIDING EXPERIENCE, MOTORCYCLE OWNERSHIP

Occupation of Owner	% of Total Owners* '85	'80
Laborer/Semi-Skilled	22.2%	20.7%
Professional/Technical	18.3%	18.8%
Mechanic/Craftsman	14.7%	23.3%
Manager/Proprietor	9.1%	8.6%
Clerical/Sales	8.1%	9.3%
Service Worker	6.4%	7.1%
Farmer/Farm Laborer	6.4%	4.6%
Military	1.6%	1.9%
Other	4.6%	0.0%
Not Stated	8.6%	5.7%

*Based on owners employed.

Household Income for Prior Year	% of Total Owners '85	'80
Under $10,000	10.6%	9.1%
$10,000-$14,999	9.0%	13.0%
$15,000-$19,999	11.2%	13.9%
$20,000-$24,999	8.5%	12.9%
$25,000-$34,999	17.8%	12.5%
$35,000-$49,999	13.9%	5.9%
$50,000 and Over	6.8%	2.4%
Don't Know	22.2%	30.3%
Median	$25,900	$17,500

Years Regularly Riding Motorcycles**	% of Total Owners '85	'80
Under 3	13.9%	21.1%
3-5	22.3%	27.6%
6-10	28.3%	29.8%
Over 10	34.5%	18.6%
Not Stated	1.0%	2.9%
Median (yrs.)	8.0	6.0

**Scooters and ATVs not included.

Total Motorcycles** Ever Owned	% of Total Owners '85	'80
1	22.4%	25.6%
2	20.1%	21.4%
3-4	26.8%	26.5%
5-9	18.5%	16.0%
10 or More	11.0%	7.6%
Not Stated	1.2%	2.9%
Median (cycles)	3.0	3.0

Note: The owner is defined as the primary rider.

Source: 1980 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, April 1981.
1985 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, February, 1986.

OTHER NATIONAL MOTORCYCLE ORGANIZATIONS

MOTORCYCLE SAFETY FOUNDATION

National Headquarters
2 Jenner Street, Suite 150
Irvine, California 92718
(714) 727-3227

The Motorcycle Safety Foundation (MSF) was organized in 1973 to promote the safe use of motorcycles on the nation's public streets and highways. The MSF cooperates with the National Highway Traffic Safety Administration, state governments and other safety organizations to develop programs and materials to upgrade motorcycle operator education, and motorcycle testing and licensing procedures. Over 3,400 MSF Certified Instructors teach rider education at 772 sites. Locations are available by calling 1-800-447-4700. The MSF has developed numerous publications, research studies and films on cycle safety and maintains contact with the media to increase motorcycle safety awareness.

SPECIALTY VEHICLE INSTITUTE OF AMERICA

2 Jenner Street, Suite 150
Irvine, California 92718
(714) 727-3727

The Specialty Vehicle Institute of America (SVIA) was formed in 1983 to foster and promote the safe and responsible use of specialty vehicles manufactured or distributed in the United States. The SVIA has developed and implemented a national ATV rider safety training program, and continues to work on developing ATV voluntary standards, promoting model state legislation on ATV riding, and serving as a liaison with state and Federal agencies on ATV training and environmental issues.

ATV SAFETY INSTITUTE

2 Jenner Street, Suite 150
Irvine, California 92718
(714) 727-3727

The ATV Safety Institute (ASI), a division of the Specialty Vehicle Institute of America, was formed in 1988 to implement an expanded national program of all-terrain vehicle (ATV) safety education and awareness, based on SVIA safety programs developed since 1983. The ASI also offers an extensive array of safety publications to promote the safe and responsible use of ATVs. Information on the ATV RiderCourse and other ASI safety programs is available by calling 1-800-447-4700.

AMERICAN MOTORCYCLIST ASSOCIATION

P.O. Box 6114
33 Collegeview Road
Westerville, Ohio 43081-6114
(614) 891-2425
Membership Information 1-800-AMA-JOIN
1-800-AMA-4567 (Ohio only)

The American Motorcyclist Association, founded in 1924, is a voluntary membership organization for individuals who own and ride motorcycles. With a membership of over 165,000, the AMA has approximately 1,000 chartered clubs throughout the nation. The AMA sanctions over 4,000 amateur and professional events per year for the off-road and road riding enthusiast. The AMA also sponsors programs and contests to encourage involvement by motorcyclists in charitable work and community service. The AMA works with various government agencies and private organizations to promote and protect the interest of the American motorcyclist.

MOTORCYCLE DEALERS ASSOCIATIONS

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While this information is thought to be the most accurate available at the date of publication, the Motorcycle Industry Council assumes no responsibility for accuracy or completeness.

Additions and corrections are solicited for future publications.

Index

Accessories sales ... 25, 26

Accidents, traffic ... 38

Aftermarket:
- Dealer sales ... 25, 26
- Dollar volume ... 25
- Retail outlets ... 24, 25, 26

Age:
- Motorcycle, average ... 18
- Owner ... 42

American Motorcyclist Association ... 44

ATV Safety Institute ... 44

Brand market share ... 17

Commuting ... 33

Dealers:
- Employee payroll ... 24, 26
- Employees, number of ... 24, 26
- Retail outlets ... 24
- Retail sales ... 11, 12, 25, 26
- State associations ... 44, 45
- Years in business ... 26

Economic value:
- Aftermarket sales ... 25, 26
- Dealer sales ... 25
- Imports ... 13, 14
- Industry by state ... 11
- Off-highway industry by state ... 29
- Retail sales ... 11, 12
- Wholesale sales ... 13, 15

Education:
- Owner's level of ... 42
- Rider training programs ... 34, 35

Engine displacement:
- Fuel economy ... 33
- Imports ... 14
- Population, motorcycle ... 6, 7
- Wholesale sales ... 15

Equipment requirements, state ... 39, 40

Fatalities, traffic ... 38

Fuel Economy ... 33

Imports ... 13, 14

Income, owner household ... 43

Licensing programs & procedures, state ... 36, 37

Manufacturers & distributors ... 20, 21, 22

Mileage:
- Average ... 32
- Miles per gallon ... 33
- Model type ... 30, 31, 32
- On & off-highway ... 30, 31, 32
- Total motorcycle ... 30, 31

Model type:
- Fuel economy ... 33
- Mileage ... 30, 31, 32
- Population, motorcycle ... 6, 7, 8
- Retail sales ... 12
- Usage on & off-highway ... 28
- Wholesale sales ... 15

Motorcycle Industry Council:
- Membership ... 3
- Programs & publications ... 2

Motorcycle Safety Foundation ... 34, 35, 36, 37, 38, 44

Mopeds (motorized bicycles):
- Imports ... 14

Occupation, owner's ... 43

Operability rate ... 18

Ownership:
- Owners, characteristics of ... 42, 43
- Owners, number of ... 42
- Previous ownership ... 43

Parts sales ... 25, 26

Penetration, motorcycle ... 8, 29

Population, motorcycle:
- Engine displacement ... 6, 7
- Model type ... 6, 7, 8
- Off-highway ... 28, 29
- Penetration ... 8, 29
- Region ... 8
- State ... 8, 29
- Year sold ... 6

Production, U.S. ... 13

Public land ... 29

Region, population by ... 8

Registrations:
- Brand market share ... 17
- New registrations ... 13, 16, 17
- Total registrations ... 9, 10, 38

Retail outlets ... 24, 25, 26

Retail sales:
- Dealer ... 25, 26
- New motorcycles ... 11, 12, 25, 26, 29
- Parts & accessories ... 25, 26
- Service ... 25, 26
- Used motorcycles ... 25, 26

Rider Education ... 34, 35, 44

Scrappage/retired rate ... 18

Servicing, dealer sales ... 25, 26

Sex of owner ... 42

Specialty Vehicle Institute of America ... 44

State:
- Accidents & fatalities ... 38
- Equipment requirements ... 39, 40
- Economic value of industry ... 11, 29
- Licensing ... 36, 37
- Motorcycle penetration ... 8, 29
- Motorcycle population ... 8, 29
- Off-highway motorcycle requirements ... 40
- Operator Licensing ... 36, 37
- Public land ... 29
- Registrations ... 10, 16, 38
- Retail outlets ... 24
- Retail sales ... 11, 27, 29
- Rider Education Programs ... 35
- Usage on & off-highway ... 28, 29
- Wholesale sales ... 15

Usage:
- Mileage ... 30, 31, 32
- Model type ... 28, 30, 31, 32
- On & off-highway ... 28-33
- Operability rate ... 18
- Scrappage rate ... 18
- Seasonal ... 32
- Weekend ... 32

Wholesale sales ... 13, 15